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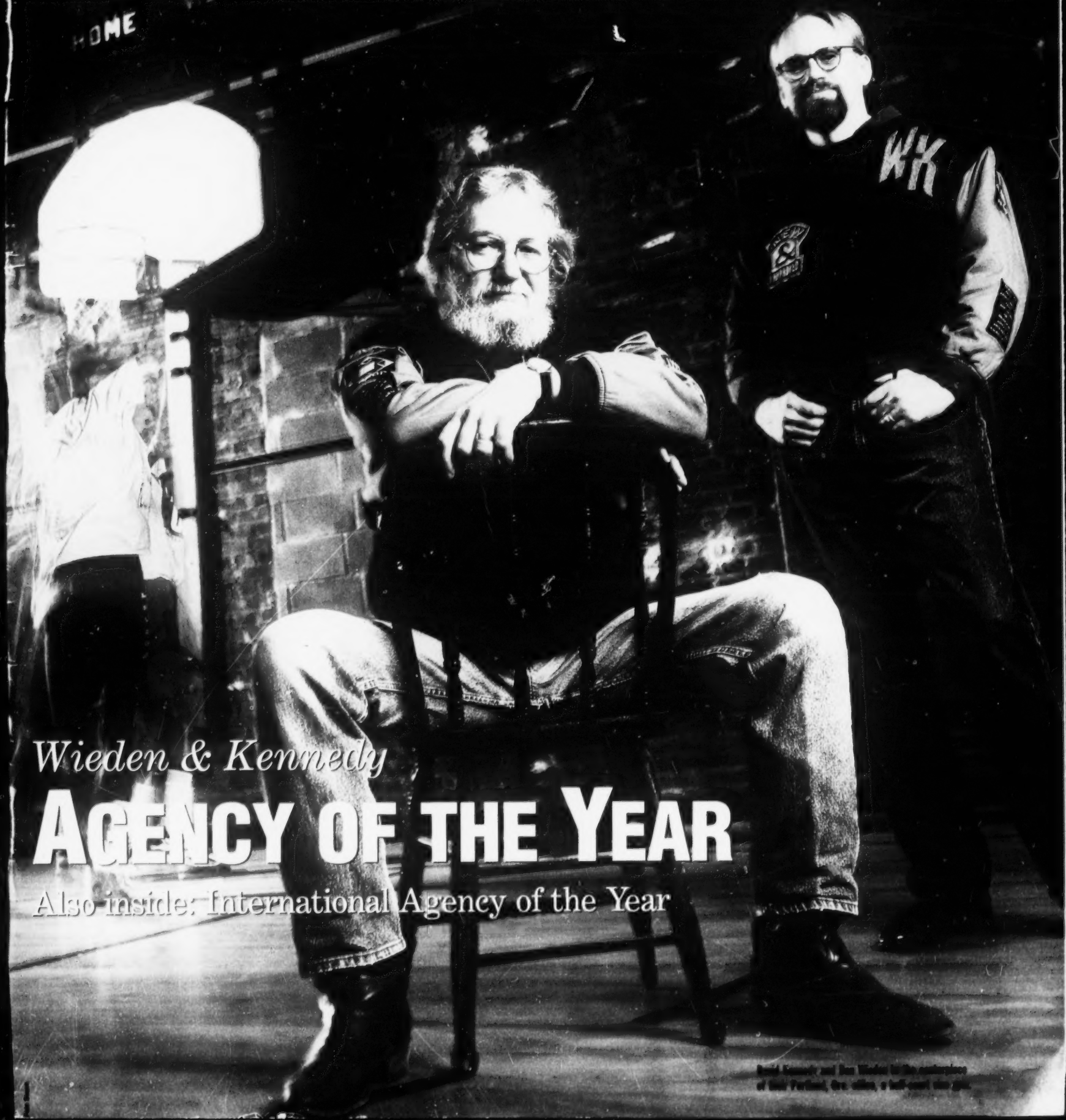
AGENCIES RANK IN U.S. & AROUND THE WORLD

April 13, 1992

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Advertising Age

Crain's International Newspaper of Marketing • In Two Sections • Section 1 • \$2.50 • \$3.00 in Canada • £5.00 in U.K.



Wieden & Kennedy

AGENCY OF THE YEAR

Also inside: International Agency of the Year

David Kennedy and Dan Wieden in the workshop of their Portland, Ore. office, a half-century ago.

NEWS SUMMARY

- **Charlotte Beers**, former head of Tatham/RSCG, was named chairman-ceo of Ogilvy & Mather Worldwide. **1**
- **General Motors'** marketing tactics will shift if board member John Smale exerts more control over its operations. **1**
- **Andy Berlin** left Goodby, Berlin & Silverstein to become president of DDB Needham Worldwide, New York. **1**
- **Four A's** leaders at the association's annual meeting blasted the growth of trade promotion spending. **1**
- **Trade promotions** now account for almost half of respondent companies' marketing budgets, a study found. **3**
- **CBS'** victory in the prime-time ratings race is credited in part to the network's strong marketing effort. **3**
- **Philip Morris USA** gave new tobacco marketing assignments to Young & Rubicam. **3**
- **Martin Puris**, ceo of Ammirati & Puris, is expected to head the Bush/Quayle re-election media team. **3**
- **Highland Superstores** named Lois/USA for broadcast creative as the electronics retailing field faces a shakeout. **4**
- **ABC** cut 15 seconds from its prime-time commercial load. **4**
- **'Time'** unveils its major redesign today. **6**
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- **Outdoor** ad spending was off only 0.7% in 1991. **45**
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- **Magazine publishers** are stiffening in their opposition to sequential liability proposals, an industry group said. **59**

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Trone wins Salem

Small shop steals RJR cig from Leber Katz

By Judann Dagnoli

Trone Advertising, R.J. Reynolds Tobacco Co.'s behind-the-scenes agency, upstaged giant FCB/Leber Katz Partners last week by winning Salem, its first major national RJR account.

The move was announced last Friday and also includes the shift of Winston Select, a new line extension previously at Trone, to Leber Katz, New York.

While Salem spent only \$10 million in 1991, according to LNA/Arbitron Multi-Media Service, RJR has promised to restore the brand's spending to traditional levels of about \$40 million.

Leber Katz is agency of record for Winston, which was supported with \$45 million in measured media spending last year. The moves are effective July 1 and "consolidate individual brand assignments," RJR said in a statement.

RJR Senior VP-Marketing David Iauco said the realignment "will help the agencies better focus on the brand for which they have primary responsibility: Camel with Mezzina/Brown, Winston with FCB/Leber Katz and Salem with Trone."

As reported, RJR has been testing ad efforts from both Trone and Leber Katz since early this year (AA, Feb. 3).

Lee Trone, president of the \$70 million Greensboro, N.C., shop bearing his name, said the agency was "extremely pleased" to have won Salem.

"We've worked really hard on great creative that seems to have

RJR has been testing ad efforts from Trone and Leber Katz since early this year.

moved the needle for RJR," he said.

The win is a significant boost for Trone, a major RJR resource in such projects as Camel's 75th anniversary campaign in 1988. Until now, the shop had failed to secure agency of record status for a national RJR brand.

Trone was named to handle Uptown, RJR's cigarette for blacks, until the controversial brand was pulled following a limited test in

Philadelphia. The shop was also assigned Dakota, a brand said to be targeted to young females, but RJR has apparently abandoned advertising for that brand after a year in a two-market test. Spending last year was less than \$1 million on Dakota.

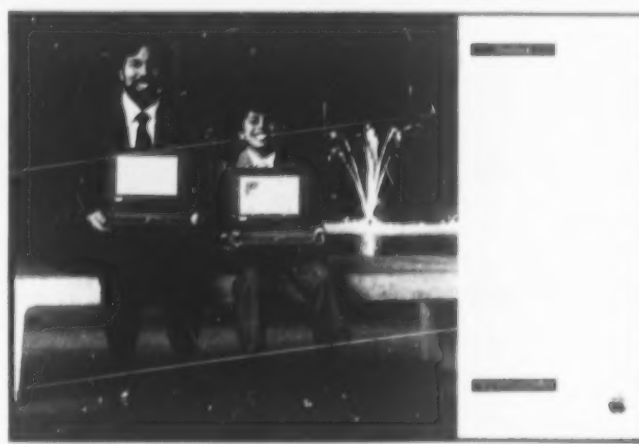
The shifts leave unchanged the \$50 million assignment of Camel at Mezzina/Brown, New York, and the combined \$10 million Doral, Magna, Sterling and Century business at Long, Haymes & Carr, Winston-Salem, N.C.

Vantage, RJR's other major brand, isn't being advertised and is instead supported with sales promotion efforts from Robinson & Maates, Chicago.

Initial advertising for Winston Select, now at Leber Katz, was created by Trone. It will break later this spring.

Mr. Iauco said last week's agency shifts "will put an end to speculation about what our agency plans were for our core brands."

But the retirement last year of Leber Katz chairman Stanley Katz, who has close ties to top RJR executives, is known to have diminished the agency's role at RJR. □



The Apple of dad's eye

Steve Wozniak, co-founder of Apple Computer, and his 9-year-old son, Jesse, will be seen holding Macintosh PowerBook portable computers in a magazine campaign breaking next month. Apple doesn't identify the duo, and that's just fine with Mr. Wozniak, who cut off his ponytail for the shoot. BBDO Worldwide, Los Angeles, created the ad and shot some footage for a TV commercial, though it hasn't decided whether to produce a spot.

U.K. election elates admen

By Stephen Downer and Laurel Wentz

LONDON—Ad executives were relieved by the surprise Conservative Party victory last week after bracing themselves for a Labor government that would have raised taxes and increased restrictions on advertising.

Agency executives were so panicked by the income tax increases outlined in the Labor Party's budget that some rushed to pay key employees a full year's salary in advance before the U.K. tax year ended April 5 to avoid the anticipated hike.

Such deals generally would involve the employee agreeing to stay for the full year and lend the money back to the company interest-free so that salary checks continue as usual.

Abbott Mead Vickers/BBDO reportedly paid salaries in advance to about 35 senior executives earning \$100,000 or more. Joint Chairman-Creative Director David Abbott wouldn't confirm the reports, saying, "I'm not commenting on internal accounting."

"It's a mixture of corporate, in-

dustrial and personal relief," said Martin Smith, deputy chairman of Bartle Bogle Hegarty, after election results were in. "Personal relief because we're exactly the kind of people they were going to hit for tax. Industrial because in a

GLOBAL NEWS

recession, things are tough enough without having money taken out of the economy. Advertising is legal and appreciated by the Conservative

tives, but within the Labor ideology, it is viewed with considerable suspicion." "Labor has a very prudish, almost Calvinistic, attitude toward advertising as such," said John Ritchie, deputy chairman of Collett Dickinson & Pearce, agency for Gallaher Tobacco (U.K.)'s Benson & Hedges cigarette and Hamlet cigar brands.

Labor offered national health initiatives that included banning tobacco advertising, imposing tighter controls on ads aimed at

young people, toughening food labeling laws and restricting speed claims in car ads.

"From the tobacco industry's point of view, the present government has consistently opposed the proposed European Community ad ban" on tobacco advertising, said Chris Bullock, director of public affairs at the Tobacco Advisory Council.

Labor and the unions that supported the party spent an estimated \$6 million on newspaper ads during the campaign's last week, almost twice the estimated Conservative spending.

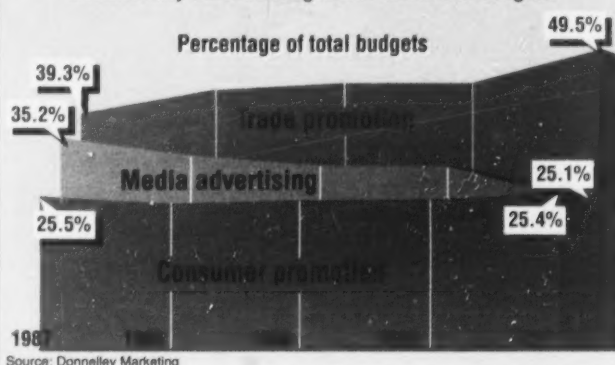
Richard Hammond, VP at Bozell Europe, estimated that 80% of the U.K. business community was opposed to a Labor government.

Polls had put Labor ahead throughout the campaign. However, it appeared the Conservatives would retain a 17-seat majority in Parliament despite falling to 321 seats, a loss of 48, while Labor won 269 seats in Parliament, a gain of 38.

"Polls are better at predicting who will drink Heineken than whether people will vote Labor or Conservative," Mr. Smith said. □

Trade promotion ups its take

Product marketers spent half their marketing budgets on trade promotion programs in 1991, a substantial increase over 1990's 44.3%. Media advertising and consumer promotion were left to divide evenly the remaining half of marketers' budgets.



Trade promos devour half of all marketing \$

By Scott Hume

The shift in marketing dollars to trade promotion from media advertising appears to be real and deep.

The question now is whether it will continue.

Donnelley Marketing this week releases its 14th annual Survey of Promotional Practices, which tracks how product marketers spend their marketing dollars.

The survey's most shocking statistic is the portion of dollars channeled last year to trade pro-

motion. Respondents said nearly half (49.5%) of their marketing budgets went to promotions and programs targeted to trade, up from 44.3% in 1990.

The rest was almost evenly split between consumer promotion programs (25.4%) and media advertising (25.1%).

That means trade promotion's growth last year came almost totally at the expense of media advertising, which in 1990 accounted for 30.6% of spending. Consumer promotion's 1990 share was 25.1%.

Trade promotion passed media advertising as the leading spending category in 1984, according to the Donnelley survey, and has steadily increased its importance since. But last year's gain was the largest percentage-point increase for any one year.

McCann-Erickson Worldwide Chairman Bob James, elected last week as this year's chairman of the American Association of Advertising Agencies, has said he intends to lead a counterattack against wasteful trade spending. (Continued on Page 53)

Y&R cops smoke biz from PM

By Judann Dagnoli

Young & Rubicam rode into Marlboro Country last week, lassoing tobacco assignments from food client Philip Morris Cos. and leaving lead tobacco agency Leo Burnett USA riding a little less tall in the saddle.

Y&R's New York office, which already handles \$210 million in food billings for Philip Morris, said it was assigned "new responsibilities in the tobacco area," including "consumer and trade promotions, special products and new-product development."

Until now, Y&R hasn't handled any Philip Morris tobacco business. Chicago-based Burnett has \$120 million in U.S. tobacco business, all but the \$7 million Parliament account handled by Backer Spielvogel Bates, New York.

Y&R's Hispanic unit, Bravo Group, is included in the assignments.

The Y&R tobacco assignment comes six months after Y&R lost R.J. Reynolds Tobacco Co.'s \$50 million Camel account.

While neither the agency nor Philip Morris would specify the nature of the new projects, it's believed one assignment is a youth-oriented, no-smoking campaign tied to Philip Morris' sponsorship of the Marlboro Grand Prix auto race in June 1993 in New York.

As part of its Grand Prix sponsorship agreement with the city, Philip Morris said it would devote one-third of its outdoor ad

(Continued on Page 59)

How CBS got to be No. 1

By Joe Mandese

NEW YORK—When CBS teamed with mass retailer Kmart Corp. to launch its new fall season three years ago, the critics laughed and headlines smirked: "Tiffany network shops at Kmart."

But CBS executives are getting the last laugh this week as the network finishes its first prime-time season in seven years in first place.

The network's remarkable turnaround is a testament not only to CBS' strong programming but to a marketing effort that generated an unusually high level of awareness and sampling of prime-time programs.

In one year, CBS moved to first place from last in the Big 3's prime-time ratings race, finishing the 1991-92 season by a margin of 1.5 rating points over No. 2 NBC.

Though the season didn't officially end until Sunday, CBS' season-to-date prime-time ratings average through April 5 was a 13.8 vs. 12.3 for NBC and 12.2 for ABC. If anything, CBS' National Collegiate Athletic Association basketball championship coverage last week was expected to boost its prime-time average an additional 0.1 rating point.

"It's clear that CBS' marketing strategy played a significant role in attracting audiences to its programming," said Jack Myers, president of Myers Marketing & Research, which researches advertisers' perceptions of the media. "What

we saw, in progressive stages over the three years of this strategy, was that the sampling was there. It grew year to year, because the promotions got more and more sophisticated. And CBS' programming held the audiences this year."

In much the same way that sophisticated consumer-product companies promote and advertise their brands, CBS used an elaborate marketing plan to position its "brands"—programs like "Murphy Brown," "Designing Women" and "Northern Exposure."

The plan began four years ago when



George Schweitzer's marketing plan for "brands" like "Murphy Brown," "Designing Women" and "Northern Exposure" led to CBS' prime-time payoff.



former VP-communications of CBS George Schweitzer returned to the network after a one-year sabbatical at Young & Rubicam as VP-director of corporate communications. (Continued on Page 60)



HOT STUFF!

"I think I used too much water," deadpans Wendy's International founder Dave Thomas in a network TV spot introducing Fresh Salads to Go prepared salads. TV, breaking April 19, will be supported with an extensive print campaign. Backer Spielvogel Bates, New York, handles.



Country singer Dwight Yoakam (l.), Olympic star Bonnie Blair, Bob "Captain Kangaroo" Keeshan and comic Howie Mandel appear in new McDonald's Corp. spots from Leo Burnett USA, Chicago. Gospel stars BeBe and CeCe Winans sing in a spot from Burrell Advertising; Ricardo Montalban is featured in a Spanish-language spot from Castor Advertising, New York.



Bush ad team wish list

Puris wants to re-enlist colleagues from '88

By Steven W. Colford

WASHINGTON—The Bush/Quayle reelection ad team will include some familiar faces if Martin Puris gets his way.

The Ammirati & Puris CEO is expected to be named soon as director of the media team that will create and place about \$30 million in ads before Election Day Nov. 3 (AA, March 2).

Unlike 1988, when Roger Ailes was responsible for all campaign media—including ads, speeches and interviews—the 1992 campaign will see those responsibilities dispersed among sev-

eral advisers. Mr. Puris, along with Robert Teeter, the campaign's chairman and chief political strategist, will have input on selection of those who will actually produce ads for the president.

Among those Mr. Puris said he'd like to see on the ad team: Hayne Spivak, exec VP-creative director of Young & Rubicam, New York; Dennis Frankenberry, chairman of Frankenberry, Laughlin & Constable, Milwaukee; and Ted

Shayne, Ms. Spivak's one-time partner and currently exec VP-director of creative services for new business at Hill, Holliday, (Continued on Page 53)



Martin Puris: A "fan" of Roger Ailes.



Advertising Age

Crain's International Newspaper of Marketing

Tokyo supplants N.Y. as ad capital

Slow growth trips up U.S. shops; top 500 revenue up only 2.9%

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By R. Craig Endicott

Hello, Tokyo!

The recession of 1991 that derailed the nation's economy and the U.S. advertising agency business managed to demote New York—with its fabled Madison Avenue—as the world's advertising capital.

According to *Advertising Age's* 48th annual Agency Report, covering more than 1,600 agencies, Tokyo agencies accounted for \$24.5 billion in billings last year, up 8.4% from 1990, while New York totaled \$24.1 billion, up only 3.2%. London finished third at \$12.1 billion, followed by Paris at \$9.7 billion and Chicago at \$7.1 billion.

The slump affecting New York also left the Top 500 U.S. agencies with revenue gains of only 2.9%, to \$7.7 billion on \$56.2 billion in U.S. billings, actually a decline when inflation is factored in. Additionally, the figures are well off the pace of 1990's 6.2% advance from the same Top 500.

Other telltale signs of low growth at home are seen in the 3.2% reduction in the agency workforce, translating into a loss of 2,108 full-time jobs to 70,200 for the Top 500 agencies, and declining volumes in billings for each of the top five ad media.

It was on the worldwide side of the ledger that the totals showed more life. For these same agencies, worldwide gross income, the industry's terminology for revenue, improved 4.7% to \$13.6 billion on billings of \$96.3 billion. The worldwide total was aided by 7% growth outside the U.S., where just 21 agencies produced virtually all the group's international tally of \$5.9 billion in gross

income. But even this growth paled when compared with the 24.9% gain recorded in the previous year.

Advertising, like its media cousin, is making the world a global village.

Among the world's leading advertising organizations—a ranking that includes the full spectrum of agency and holding company activities—leader WPP Group, London, mixed a 2.8%

Saatchi & Saatchi Advertising Worldwide remained a close second in the brand race at \$286.3 million, up 3%. The agency vies for accounts independently of subsidiaries Klemtner Advertising, Rumrill-Hoyt, Cliff Freeman & Partners, Conill Advertising and Cadwell Davis Partners.

Dentsu, the world's largest single agency, generated gross income of \$1.45 billion (90% of that from Japan), a strong 15.6% gain

to improve 1.6% in francs to break even in dollars.

The French couldn't clear this minor hurdle, although the Germans and Italians could. The 51 French agencies posted gross income of \$1.45 billion, down 4.7%, on billings of \$9.4 billion. France's top three agencies each reported declines; the 54 German agencies totaled gross income of \$1.07 billion, up 7.6%, on billings of \$7.3 billion; 31 Italian agencies amassed gross income of \$662.9 million, up 8.7%, on billings of \$4.9 billion.

The 63 reporting British shops turned in gross income of \$1.7 billion, up 2.2%, on billings of \$12.1 billion. This growth reflected the struggling British economy and a favorable exchange rate.

Collectively, 1,110 foreign agencies from 80 countries (only 46 countries were charted) had gross income of \$13.3 billion on billings of \$91.2 billion. A reflection of the power of the U.S. agencies abroad is that they account for about one out of every three dollars spent by agencies.

These foreign billings in general sustain the huge U.S.-based consolidated networks led again by Young & Rubicam with gross income of \$980.8 million worldwide, down 2.1%, on billings of \$7.3 billion.

Consolidated agency McCann-Erickson Worldwide got 7.4% growth from its international sector; BBDO Worldwide, 13.4%; DDB Needham Worldwide, 19.7%; Foote, Cone & Belding Communications, 23.7%; Leo Burnett Co., 19.4%; Lowe Group, 20.1%; Bozell, 13.6%; and J. Walter Thompson Co., 12.1%.

The trend wasn't favorable to all. Saatchi & Saatchi Advertising Worldwide's non-U.S. results actually declined by 1.4%, largely from a 4.6% slide in its London

(Continued on Page S-12)

INSIDE



With David Kennedy (l.) and Dan Wieden providing the creative momentum, Wieden & Kennedy has been selected as *Advertising Age's* Agency of the Year for 1991. See Page S-3.



Leigh Clapham (from left), Geoff Wingett and Max Gosling are all smiles as their shop, Lintas:Australia, has been chosen as the 1991 International Agency of the Year. See Page S-4.

gain from its largely three-tiered ad side with an 8.5% decline from the rest of its business to record a 2% drop to \$2.66 billion gross income. (See chart on Page S-10.)

Interpublic Group of Cos. amassed \$1.8 billion in gross income from agency networks McCann-Erickson Worldwide, Lowe Group and Lintas:Worldwide, to finish second.

Leo Burnett Co. clung to its leading position as top U.S. agency brand with domestic gross income of \$299.1 million, down 0.1%. "Branding" peels away specialty businesses and autonomous subsidiaries from the conglomerate parent in order to identify the core agency pitching most accounts.

enhanced by a 7.2% rise in the yen against the U.S. dollar—the strongest growth of a major currency. Japan's 42 reporting agencies pushed gross income to \$3.6 billion, up 11%, or nearly two-thirds the U.S. total, on billings of \$26.6 billion, according to the international tables in this report charting activity in 46 countries.

AA does not apply current-year exchange rates to prior-year numbers, a procedure that unavoidably lowers international returns when the dollar is on the rebound as it was in 1991.

In Europe, the lira fell 2.2%, the French franc 1.6% and the deutschmark 1.3%. Using the franc as an example, a French agency's year-to-year returns had

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Who's on top in 1991 gross income

Top 10 advertising organizations

Rank	Agency	Worldwide gross income	% chg
1	WPP Group	\$2,661.8	-2.0
2	Interpublic Group of Cos.	1,798.9	3.6
3	Saatchi & Saatchi Co.	1,705.5	0.3
4	Omnicom Group	1,471.2	9.1
5	Dentsu	1,451.0	15.6
6	Young & Rubicam	1,057.1	-1.5
7	Euro RSCG	1,016.3	-5.1
8	Grey Advertising	659.3	6.9
9	Hakuhodo	655.6	11.8
10	Foote, Cone & Belding Communications	616.0	13.4

(See Page S-10 for a ranking of 50 ad organizations)

Top 10 U.S.-based consolidated agencies

Rank	Agency	Worldwide gross income	% chg
1	Young & Rubicam	\$980.8	-2.1
2	Saatchi & Saatchi Advertising Worldwide	829.2	1.8
3	McCann-Erickson Worldwide	811.6	7.2
4	Ogilvy & Mather Worldwide	794.9	2.5
5	BBDO Worldwide	772.8	6.8
6	Lintas:Worldwide	729.7	-0.9
7	J. Walter Thompson Co.	727.0	5.3
8	DDB Needham Worldwide	698.4	11.7
9	Backer Spielvogel Bates Worldwide	630.4	1.9
10	Foote, Cone & Belding Communications	616.0	13.4

(See Page S-12 for a ranking of consolidated agencies)

Top 10 U.S. agency brands

Rank	Agency	U.S. gross income	% chg
1	Leo Burnett Co.	\$299.1	-0.1
2	Saatchi & Saatchi Advertising Worldwide	286.3	3.0
3	Grey Advertising	269.9	5.3
4	J. Walter Thompson Co.	234.0	-3.6
5	Foote, Cone & Belding Communications	228.9	3.2
6	Ogilvy & Mather Worldwide	224.8	2.0
7	McCann-Erickson Worldwide	212.5	6.3
8	Young & Rubicam	212.4	-1.9
9	BBDO Worldwide	211.4	1.6
10	D'Arcy Masius Benton & Bowles	202.2	-1.0

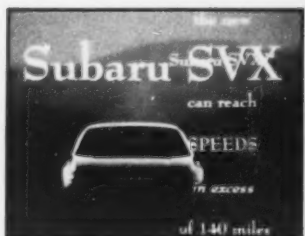
(See Page S-16 for a ranking of more than 500 agency brands)

Notes: Dollars are in millions.

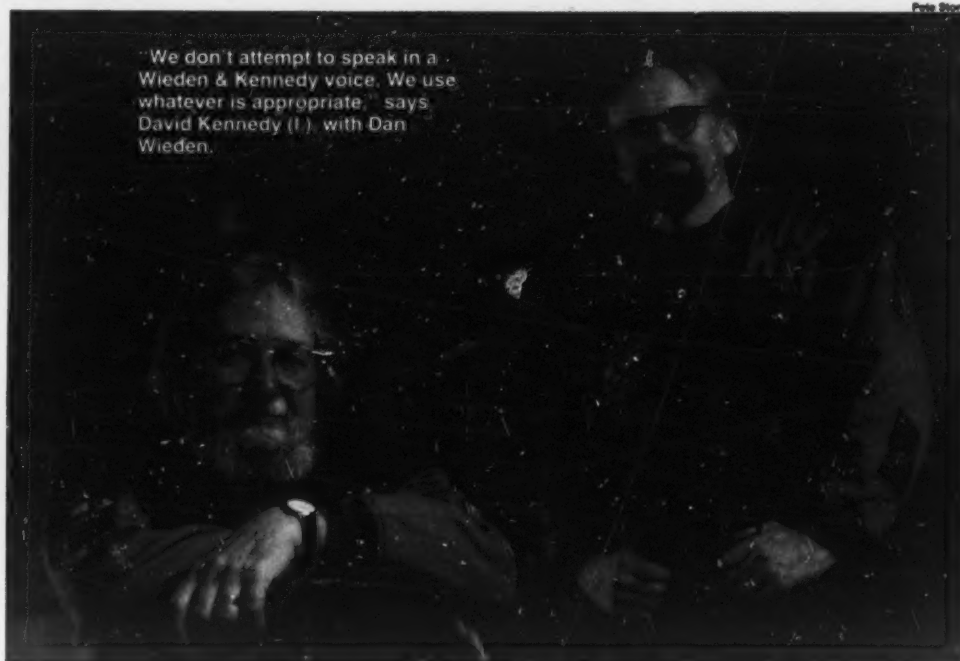
AA chart: Kevin Brown



Nike challenges fitness fans in this spot, featuring images superimposed on buildings, noting that "there is no finish line."



Subaru commercials show the voice-over script scrolling up the right side of the screen to emphasize the message.



A Pepe jeans spot features a Wieden & Kennedy trademark: getting two concurrent messages on the screen at the same time.



Pacific First Bank spots detail in humorous fashion the expenses for weddings and other major events.

U.S. Agency of the Year

Wieden & Kennedy: Keeping ad game fresh

By Cleveland Horton

For its artistry in generating and maintaining creative momentum during an economic recession, Wieden & Kennedy has been selected *Advertising Age's* Agency of the Year for 1991.

In honoring the breakthrough creative work produced by this 10-year-old Portland, Ore.-based agency, *Ad Age* returns to its Agency of the Year annual tradition. A year ago, when *Ad Age's* editors felt there was no "clear superiority" or a "dominant 'creative breakthrough' for all to gawk at and admire," there was no Agency of the Year for 1990.

Wieden & Kennedy—the third consecutive West Coast agency to win *Ad Age's* top creative honor—goes to great lengths to promote an anti-establishment image. And in a year when few blockbuster campaigns flickered across TV screens or leaped off the printed page, the agency was able to manifest that same quality in the brilliant campaigns it produced.

It seems as though 1991, with its recession-riddled ad budgets, corporate downsizing and grim, fight-for-survival mood, served to highlight Wieden's special creative "voice" and helped build among consumers a special appreciation of its fresh work.

This small, independent shop continued its tradition of delivering fresh, innovative campaigns throughout 1991, raising the creative bar yet another notch. In some ways, it beat its own creative high marks by extending campaigns thought to have peaked.

For example, there's the agency's work for Nike, which from day one has been primarily responsible for Wieden's rapid growth. The Nike work has earned the agency many accolades, particularly for spots featuring two-sport phenomenon Bo Jackson.

But when Mr. Jackson injured his hip and found his athletic career in jeopardy, the agency came up with a credible way to incorporate the superstar's physical rehabilitation: It created a compelling piece for Nike cross-training shoes.

Meanwhile, Wieden won the Subaru of America account last year, and its first campaign for this highly visible client brought a refreshing new voice and a knowing, candid premise to automotive advertising. With the Subaru work, Wieden laid to rest any lingering notion it was

a one-trick pony.

The body of its work has, to be sure, given rise to suggestions that there's now a Wieden & Kennedy "brand" of advertising. But this seeming put-down draws objections from both partners.

First, the principals refer to their work not as "advertising" but as "communication." Second, they insist each campaign is tailored to the advertiser.

"We try to communicate on behalf of all our clients," says David Kennedy, chairman and art director of the founding creative team. "We don't attempt to speak in a Wieden & Kennedy voice. We use whatever is appropriate."

However, Dan Wieden, president and copywriter, acknowledges there may be a common thread, though not a formula, to the agency's work.

"I suppose, like any good actor or actress, you end up leaving a signature on work—that is unintentional—just because of who you are," he says.

One aspect of that "signature" may be a very busy screen in TV advertising. The agency split the screen in campaigns for both Pepe Sportswear and Anne Klein's A Line clothing.

In a Pepe jeans spot, one-fourth of the screen features a spigot dripping water, while on the rest of the screen viewers see teen-agers dancing, intercut with the company's logo on a background of stylized water.

Similarly, the A Line spots divide the screen, with the voice-over's words printed in the smaller portion.

Meanwhile, in Wieden's early Subaru TV work, the voice-over scripts scroll up the right side of the screen, with certain words duplicated in larger type for emphasis.

In print, that signature may be a tone of voice accompanying an image, spoken in the language of the prospective customer.

A Nike spread, for example, shows a photo of a freckle-face teen-ager on the left page, opposite a copy block on the right.

"This is a picture of a 40-year-old woman," begins the copy in oversize type. Smaller type follows: "or perhaps just a picture of the way a 40-year-old woman feels. . . . If you believe your age you might not climb whatever hills you are supposedly over. If you believe 25 or 30 or 48 or 62, you might believe it is time to stop. When you are really [then in large type]

just beginning to go."

No picture of a sneaker. No reference to footwear. Just a small Nike logo in the upper right corner.

Neither partner admits to a favorite medium, but Mr. Kennedy acknowledges: "We've never been a real strong radio agency."

When pressed, Mr. Kennedy defines the agency's advertising as "having some honest, startling, refreshing communication with someone we're talking to in whatever medium. I think that's always going to be relevant. This is not about one brand or style. It's about a basic respect you have for the people you're talking to."

That sentiment is also apparent in the agency's work for Pacific First Bank, whose slogan is "We fund reality."

To dramatize that idea, Wieden created a TV spot that shows a couple in bed, the husband kept awake by the noisy party next door. As his frustration grows, video billboards, each suggesting a solution and its cost, appear: "Earplugs, \$1.90," reads

the first. "Sominex, \$3.75." "Shotgun, \$550." And finally: "New house, new neighbors, \$144,800."

Whatever the agency's doing, it's working. Billings at Wieden & Kennedy keep climbing—up 63% to \$165 million in 1991—and the agency, now numbering about 200 people, keeps adding staff. The Subaru win forced Wieden to open a 35-person East Coast office in Cherry Hill, N.J., bringing with it the difficulties of transporting agency culture 3,000 miles.

To make sure a certain measure of the Wieden culture would travel well, the partners sent two senior executives, David Luhr and Scot Butler, from Portland to run the office.

"We periodically do 20-minute or half-hour mini-video movies from one office to the other as a way of spreading the weirdness," Mr. Wieden says.

Future growth may come from expansion overseas, in large part to service Nike's international needs. Nike is now at the stage where it examines each campaign for its global applications. In fact, the Air 180 shoe introduction premiered worldwide last spring.

"Before I leave this place, I'd love to see us somehow successfully integrated into the small group of international advertising agencies," Mr. Wieden says. He wouldn't elaborate on how that would take place. But the partners firmly oppose any thought of selling the agency.

"After we're gone, the name of the agency's going to be Wieden & Kennedy, not Omnicom," Mr. Kennedy says. "We're trying to pass it on to the people who work here."

Mr. Wieden, 47, and Mr. Kennedy, 52, are thinking about succession within the agency, but "I don't want to talk about it in the press," Mr. Wieden says. Currently, only three people hold equity in the shop. Apart from the named partners, Dennis M. Fraser, a founder and currently director of print production, is the only other shareholder.

But as the agency has grown from a creative boutique, it's added non-creative services, as demanded by clients.

Unlike most entrepreneurs, who always knew what business they had to be in, Messrs. Wieden and Kennedy never set out to become agency executives.

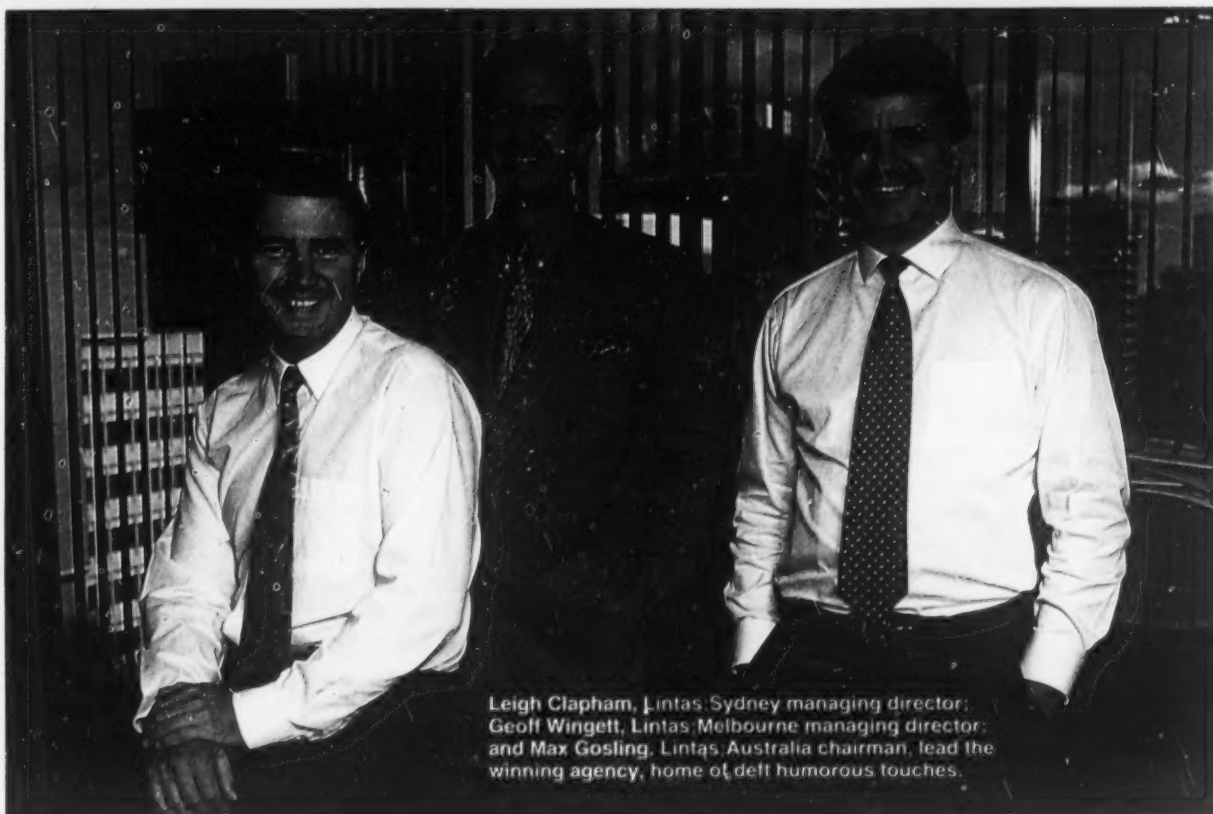
"I don't think I ever wanted to be an adman," Mr. Wieden says. "My dad was

(Continued on Page 50)

Past winners: U.S.

- 1990 (No award given)
- 1989 Goodby, Berlin & Silverstein
- 1988 Chiat/Day
- 1987 Leo Burnett Co.
- 1986 Foote, Cone & Belding
- 1985 Hill, Holliday, Connors, Cosmopolis
- 1984 BBDO
- 1983 Fallon McElligott Rice
- 1982 Ogilvy & Mather
- 1981 Ally & Gargano
- 1980 Chiat/Day
- 1979 Henderson Advertising
- 1978 (tie) N W Ayer
Young & Rubicam
- 1977 Needham Harper Worldwide
- 1976 DKG Advertising
- 1975 Leo Burnett Co.
- 1974 Scali, McCabe, Sloves
- 1973 Cunningham & Walsh

Ad Age's annual selection of Agency of the Year is based on evaluation, by a committee of the publication's editors, of the creative product of the nominated agencies. Creativity, rather than size or business success, is given primary consideration to allow agencies of all sizes to compete. While nominations are made by *Ad Age* staff members, consideration is also given to nominations put forth by others, including the agencies themselves.



Leigh Clapham, Lintas Sydney managing director; Geoff Wingett, Lintas Melbourne managing director; and Max Gosling, Lintas Australia chairman, lead the winning agency, home of deft humorous touches.

International Agency of the Year

Fresh, attention-grabbing, clear: Lintas:Australia top int'l shop

By Geoffrey Lee Martin

SYDNEY—The toddler in the crumpled green jumpsuit rolls over the edge of the couch as his feet urgently feel for the carpet. "Tranquility Base here . . . the Eagle has landed," says the teasingly familiar voice-over, recalling the first moonwalk.

The baby lets go and triumphantly staggers a few steps. "OK, Neil, you're looking good . . ." "That's one small step . . ."

Each significant move of the child is frozen for a second as a shutter whirs. Then the punch line: "Would the greatest event in the world be quite as great on anything less than Fuji film?"

Advertising such as this—fresh, attention-grabbing, compelling—is why Lintas:Australia has been chosen as *Advertising Age's* 1991 International Agency of the Year. The winner of the eighth annual contest was chosen from entries representing 72 agencies from 23 countries. Judging was based on creative work for campaigns breaking in calendar 1991.

Many of Lintas:Australia's ads are notable on two counts: They feature a lot of copy, reminiscent of legendary adman David Ogilvy's type-packed print ads of the 1960s, and there's often a light, deft touch of humor, almost used as a footnote.

"We consciously create advertising that includes dialogue," said Allan Crew, the agency's national creative director. "Yes, it's one of the hardest forms to get right, but when you do, it is one of the most effective."

Sophisticated yet dollar-conscious consumers in recession-weary Australia are hungry for information, Mr. Crew said.

"But in today's world, you also need to lighten up a bit, and if your message is going to be noticed, then humor is a proven, very powerful advertising tool," he said. "If you go for the gut laugh, I believe you are going to fail. What we try for is that little wry smile."

The agency doesn't set out to be the ex-

ponent of any particular style.

"There has been a trend to go toward art-directed spots by some agencies. I think we have gone the other way. We look for the story into which we can place the product," Mr. Crew said.

Two 1991 campaigns prove his point: Johnson & Johnson's Sure & Natural sanitary napkins and Honda Motor Co. cars. Both rely on strong, finger-clicking rhythm with women's bodies and cars moving in swirls of color and a touch of sex—and no words at all, just captions.

"There happens to be a similarity in the use of music and rhythm in the J&J and Honda spots, but they were done by totally different teams: J&J in Sydney, while I worked with our Melbourne team on Honda. There are people who want to turn the J&J spot into a disc, and that might well happen," Mr. Crew said.

Lintas opened in Australia in 1931 and now has 223 employees in six offices. The *Ad Age* accolade may surprise local competitors who still recall the mid-1980s, when the agency's reputation was in the doldrums, surviving only because of internationally aligned accounts.

Even today, Lintas' more myopic international peers talk condescendingly of the shop, 100% owned by Interpublic Group of Cos., as "a good solid agency."

But the Lintas turnaround is undeniably impressive. In a severe recession, while others stumbled, Lintas' 1991 billings jumped 9.3% to \$122.1 million. Gross income rose 9.3% to \$18.3 million.

The agency jumped to No. 6 last year from 10th in 1990 in national rankings, racing past other international rivals that dropped in billings or rank: Saatchi & Saatchi Advertising and Lintas' sister

agency, McCann-Erickson. Lintas also passed Neville Jeffress Armstrong's.

Max Gosling, chairman of Lintas:Australia, said the "good and solid" industry reputation sits comfortably with him. "Our creative work is very good too, a lot better than some will concede—it's just overshadowed by our performance."

The agency's resurgence began about 1987, after a shakeout moved up Mr. Gosling from managing director of the Sydney shop to his current post. About the same time, Leigh Clapham joined Lintas:Australia as managing director.

"We were a new wave, very much so," Mr. Gosling said. The agency gradually built a fresh creative team and bought the majority of McSpedden Carey, a Sydney creative shop.

Mr. Clapham added: "We are committed to long-term, brand-building advertising. Too many agencies have gone for short-term fixes, especially in the '80s, trying to be dynamic and forgetting the core value of brands. But Lintas has been able to sustain long-running campaigns."

He cited Rexona and especially the sports personality campaign originated 20 years ago and now running in 25 countries. Others that are international clients with local campaigns include Unilever's Impulse body cologne and Surf laundry detergent, Sterling Winthrop's Panadol, Flora margarine and even Nestle's "Moments like these" campaigns for Minties.

International alignments are often a sensitive topic when an agency doesn't grow in the local marketplace as well.

Mr. Gosling, who's also vice chairman of Lintas:Asia Pacific, is slightly defensive: "They're important. They allow us to go and talk with possible clients, but it doesn't win us the business. You win business on your own performance."

A key example of the advantage of being strong internationally but even stronger locally is Lintas' work for Nestle Confectionery, he said.

"Lintas has business with [Nestle] worldwide, but in the past two years we in Australia have renewed our association and the relationship has become very strong," Mr. Gosling said. "We hold all the discretionary local brands . . . Nestle is giving the business to what they believe is a strong local agency."

Mr. Clapham said: "If we have an edge in the marketplace, it is our long-term commitment and passion for understanding the consumer."

Clients agree. John Creagh, marketing manager for the Australian Pork Corp., said the agency's food research work has resulted in ads producing strong results.

"In spite of the recession, we finished the year 6% up in retail sales for fresh pork," he said.

Alison Dummett, Prudential Assurance's divisional manager of marketing services, said Lintas "did a lot of work investigating the financial services field, including qualitative research."

She praised the agency's work and perceptiveness in the finance field.

Said Jon Platt, a senior writer at Lintas:Australia: "The highest-rating programs on television involve human drama . . . not special effects or clever camera work. If you take that on board and put some human warmth into your advertising, create empathy with your characters, then you will succeed."

"We are simply trying to create the best ad in each category."

That Lintas:Australia does. No accident about it. □



A toddler seems to defy gravity in this Fuji film TV spot.



Striking creative has helped Unilever's Rexona grow in Australia and globally.



Snappy rhythms, swirls of color and a touch of sex drive Honda's spots home.



Nestle's "Moments like these" Minties spots are out of this world.



Strong local flavor is brewed into Nestle's Coffee-mate ads.



Felicity Kendall shows a lobster its "Jacuzzi" in a Flora margarine ad.

Past winners: International

1990 Baker Lovick, Canada
1989 Contrapunto, Spain
1988 DDB Needham, U.K.
1987 Dentsu, Japan
1986 Mojo MDA, Australia
1985 Lowe Howard-Spink, U.K.
1984 Prins, Meijer, Stamenkovits & van Walbeek, Netherlands

Independent Agency Networks

Independent Agency Network, headquarters
Advertising & Marketing International Network, Cleveland
Affiliated Advertising Agencies International, Denver
Alliance International Group, London
Business-to-Business Network Ltd., Macclesfield, U.K.
ComVort GmbH, Berlin
Crossworld International Advertising Partnership, Paris
Dialogue International S.A., Brussels
Dorland Europe Continental S.A., Berlin
Group '92, London
Intermarket Association of Advertising Agencies, Dayton, Ohio
International Federation of Advertising Agencies, Schaumburg, Ill.
Interpartners Communications, Brussels
Mutual Advertising Agency Network, Cleveland
North American Advertising Agency Network, New York
Transworld Advertising Agency Network, New York

	Gross income			Billings			Agency members	
	1991	1990	% chg	1991	1990	% chg	Worldwide	U.S.
Advertising & Marketing International Network, Cleveland	\$180	NA	NA	\$1,200	NA	NA	41	26
Affiliated Advertising Agencies International, Denver	480	\$360	33.3	3,200	\$2,400	33.3	88	55
Alliance International Group, London	106	147	-27.7	703	958	-27.4	18	1
Business-to-Business Network Ltd., Macclesfield, U.K.	28	17	60.8	183	114	60.5	11	1
ComVort GmbH, Berlin	44	NA	NA	295	NA	NA	18	1
Crossworld International Advertising Partnership, Paris	36	30	20.0	200	170	17.6	15	1
Dialogue International S.A., Brussels	53	45	17.8	350	300	16.7	15	1
Dorland Europe Continental S.A., Berlin	21	NA	NA	140	NA	NA	9	0
Group '92, London	48	NA	NA	323	NA	NA	8	0
Intermarket Association of Advertising Agencies, Dayton, Ohio	34	32	7.2	228	212	7.3	19	19
International Federation of Advertising Agencies, Schaumburg, Ill.	195	165	18.1	1,297	1,098	18.1	45	17
Interpartners Communications, Brussels	97	93	4.9	647	616	5.0	24	2
Mutual Advertising Agency Network, Cleveland	58	56	3.2	380	370	2.7	33	31
North American Advertising Agency Network, New York	132	126	4.9	878	837	4.9	66	40
Transworld Advertising Agency Network, New York	90	92	-1.6	600	610	-1.6	42	22

Notes: Gross income and billings are in millions of U.S. dollars.

AA Chart, Kathy Wofsy

Independent shop networks catching on in Europe

Expansion and growth in the number of independent agency networks has paralleled the buyout frenzy that reshaped the agency and marketers' universe in the past decade.

Nowhere is this more apparent than in Europe.

Half the independent networks included in Ad Age's first listing of such global operations were formed since the mid-1980s, all Europe-based. The 15 networks in this survey comprise 452 small agencies of which 217 are in the U.S. Those agencies had collective gross income of \$1.6 billion in 1991 on billings of \$10.6 billion.

Independent networks provide members, generally small local shops, with broader coverage for their clients and improve their chances of sharing multinational clients that become part of the network's client pool.

U.S.-based independent networks have been around since the 1930s. In Europe, however, the growth of newly formed networks is motivated by a need to counter the consolidation taking place in the agency and advertiser communities as Europe moves closer to one market.

Mega-agency mergers that gave local advertisers a window to other national markets put pressure on the local agency without pan-European connections. At the same time, the mega-agencies also began to serve a widening number of multinational clients who bought out local clients to target new markets, according to Norval Stephens, International Federation of Advertising Agencies executive director.

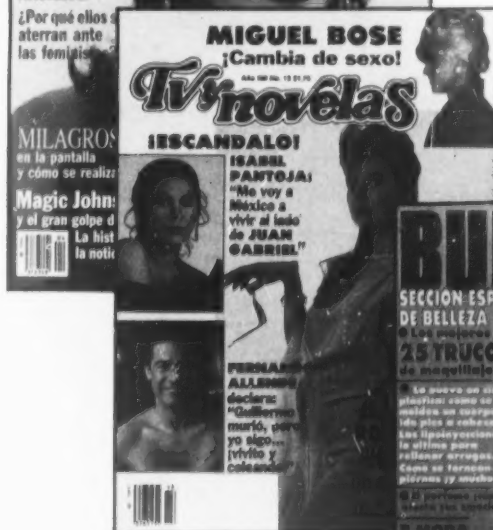
Independent networks position themselves as an alternative to the bureaucratic, costly mega-agency networks.

"Local people also have equity in their agency and the agency has equity in its international network, so there is at least twice the motivation to ensure that our clients' campaigns travel well," said Berry Gelder, CEO of Interpartners Communications in Brussels.

Structures of the independent networks run the gamut. The network may be in name only with no central executive and no financial participation other than initiation fees and annual dues. Others are financially owned by members through a share structure. Some indies are known well enough among advertisers to be included in account pitches, although most are involved only peripherally through the support services they provide a member agency. □



1 for the money.



2 for the show.



3 to get ready.

We've got the audience to fit your target.

When it comes to reaching Hispanic women in the U.S., we've got the one, two, three and four ideal top-quality publications.

One is Vanidades. Our flagship publication. Specializing in beauty and fashion. The one to reach the upscale Hispanic woman 25-54 with lots of money to spend. ¡Mucho dinero!

Two is TV y Novelas. The one for the show. All about the private lives and intimate secrets of the most famous Latin showbiz stars. Reach adult TV viewers for less!

Three is Buenhogar. The Spanish-language version of Good Housekeeping. What the modern Hispanic homemaker reads when she is ready to buy.

And four is Cosmopolitan en Español. Reach "La Chica Cosmo" —that 18-34, independent Hispanic woman on the go.

So get ready, get set and go... Call any of our three regional sales offices and ask to set up a meeting with one of our sales representatives.



And 4 to go.

America Publishing Group

SPANAMERICA.

The National Hispanic Magazine Network

Regional Sales Offices: New York: (212) 687-8760 • Los Angeles: (213) 937-2500 • Miami: (305) 871-6400, ext. 181

World's Top 50 advertising organizations

Ranked by equity gross income

Rank '91	Rank '90	Advertising organizations, headquarters	U.S.-based agency brands included	1991	Worldwide gross income 1990	% chg	1991	Worldwide capitalized volume 1990	% chg
1	1	WPP Group , London	Ogilvy & Mather Worldwide; Thomson-Leads; Cole & Weber; Ogilvy & Mather Direct; Ogilvy & Mather Yellow Pages; A. Elcott & Co.; J. Walter Thompson Co.; J. Walter Thompson Direct; J. Walter Thompson Healthcare; Thompson Recruitment; Brouillard Communications; Seali, McCabe, Slaves; Fallon McElligott; Morton Goldberg Associates; The Martin Agency; Stenrich Group	\$2,661.8	\$2,715.0	-2.0	\$17,915.8	\$18,095.0	-1.0
2	2	Interpublic Group of Cos. , New York	McCann-Erickson Worldwide; McCann Direct; McCann Healthcare; Lintas Worldwide; Lintas Marketing Communications; Dailey & Associates; Fahlgren Martin; GS&B Lintas; Long, Haymes & Carr; Lowe Group; Lowe & Partners; Laurence, Charles, Free & Lawson	1,798.9	1,735.6	3.6	12,100.8	11,684.9	3.6
3	3	Saatchi & Saatchi Co. , New York/London	Saatchi & Saatchi Advertising Worldwide; Cadwell Davis Partners; Conill Advertising; Cliff Freeman & Partners; Klemmer Advertising; Rumrill-Hoyt; Team One; Sackler Spielvogel Boies Worldwide; AC&R Advertising; Kobs & Draft; Campbell-Millies-Easy	1,705.5	1,700.5	0.3	11,663.4	11,637.4	0.2
4	4	Omnicom Group , New York	BBDO Worldwide; Baxter, Guran & Mazze; Frank J. Corbett Inc.; Doremus & Co.; Levey Wolff Swift; Tracy-Loche; DOB Needham Worldwide; Bernard Hodes Group; Kallir, Philips, Ross; Rainoldi Kenner Radcliffe; Rapp Collins Marcora	1,471.2	1,349.0	9.1	10,442.9	9,813.2	6.4
5	5	Dentsu , Tokyo	Dentsu America	1,451.0	1,254.8	15.6	10,680.1	9,671.6	10.4
6	6	Young & Rubicam , New York	Young & Rubicam; Cato Johnson Worldwide; Chapman Direct; Sudler & Hennessey; Wunderman Worldwide	1,057.1	1,073.6	-1.5	7,840.1	8,000.7	-2.0
7	7	Euro RSCG , Paris	Della Femina, McNamee, Lally, McFarland & Pontello; Messner Velero Berger; Carey Schreiner; Tatham/RSCG	1,016.3	1,071.4	-5.1	6,955.7	6,894.8	0.9
8	8	Grey Advertising , New York	Grey Advertising; Gross Townsend Frank Hoffman	659.3	617.0	6.9	4,437.4	4,135.2	7.3
9	9	Hakuhodo , Tokyo	Hakuhodo Advertising America	655.6	586.3	11.8	4,686.7	4,529.4	3.5
10	10	Foot, Cone & Belding Communications , Chicago	Foot, Cone & Belding Communications; FCB Direct/U.S.; IMPACT; VICOM/FCB; Wahlstrom & Co.	616.0	543.4	13.4	4,651.0	4,390.1	5.9
11	12	Leo Burnett Co. , Chicago	Leo Burnett Co.	576.6	531.8	8.4	3,890.6	3,585.4	8.5
12	11	D'Arcy Masius Benton & Bowles , New York	D'Arcy Masius Benton & Bowles; Medicus Intercon; International; Clanton Marketing & Communication	534.6	532.5	0.4	4,509.3	4,406.7	2.3
13	13	Publicis-FCB Communications , Paris	Publicis	512.8	438.1	17.0	3,433.7	2,962.7	15.9
14	14	BDDP Worldwide , Boulogne, France	Wells Rich Greene BDDP	277.0	236.0	17.4	1,941.3	1,625.4	19.4
15	15	Bazell, Jacobs, Kenyon & Eckhardt , New York	Bazell; Poppe Tyson	221.0	213.4	3.6	1,660.0	1,570.0	5.7
16	17	Tokyu Agency , Tokyo	NA	176.9	170.3	3.9	1,482.4	1,387.0	6.9
17	19	Daiko Advertising , Osaka, Japan	NA	174.3	159.5	9.3	1,278.1	1,199.3	6.6
18	16	N W Ayer , New York	N W Ayer	171.3	185.9	-7.9	1,361.1	1,469.2	-7.4
19	20	Asatsu , Tokyo	Asatsu America	166.2	140.7	18.1	1,194.0	1,018.0	17.3
20	24	Dai-ichi Kikaku Co. , Tokyo	Krosser Craig D I K	159.9	133.8	19.5	1,113.1	916.2	21.5
21	22	TBWA Advertising , New York	TBWA Advertising	144.8	137.8	5.1	1,001.3	919.0	9.0
22	21	Chiat/Day/Mojo , Venice, Calif.	Chiat/Day/Mojo; Anderson & Lemble	141.1	139.2	1.4	1,022.6	1,006.7	1.6
23	25	Dentsu, Young & Rubicam Partnerships , New York	Lord, Dentsu & Partners; Bowles Dentsu & Partners	129.2	128.0	1.0	935.9	924.9	1.2
24	23	Ketchum Communications , Pittsburgh	Ketchum Communications	127.2	134.2	-5.2	978.8	1,030.4	-5.0
25	18	Lopez , London	Warwick Baker & Fove	124.0	163.3	-24.1	818.4	1,077.9	-24.1
26	28	Yomiko Advertising , Tokyo	NA	110.8	102.9	7.7	889.6	795.6	11.8
27	27	I&S Corp. , Tokyo	NA	106.1	104.1	1.9	849.0	833.0	1.9
28	26	Ross Roy Group , Bloomfield Hills, Mich.	Ross Roy Inc.; Calet, Hirsch & Spector; Griswold	105.1	106.0	-0.9	700.5	707.0	-0.9
29	32	Chell Communications , Seoul	NA	101.6	73.1	39.1	315.8	274.1	15.2
30	29	Asahi Advertising , Tokyo	NA	96.7	88.9	8.8	582.1	522.7	11.4
31	30	Man Noh Sha , Osaka, Japan	NA	91.1	87.0	4.7	588.0	566.0	3.9
32	31	Gold Greenlees Trott , London	Babbie & Reiman Advertising; GSD&M; Martin-Williams Advertising	87.0	86.3	0.8	629.4	628.0	0.2
33	34	FCA Group , Suresnes, France	Bloom FCA	79.0	66.1	19.7	615.5	510.7	20.5
34	38	Sogei , Tokyo	NA	68.4	57.8	18.3	433.0	364.6	18.7
35	35	Armando Testa Group Worldwide , Milan	NA	67.1	64.3	4.3	515.0	481.8	6.9
36	33	Clemenger/BBDQ , Melbourne	NA	66.0	67.1	-1.7	391.2	399.0	-2.0
37	40	TMP Worldwide , New York	TMP Worldwide	65.3	55.8	17.0	435.3	371.9	17.0
38	36	Nihon Keizaiisha Advertising , Tokyo	NA	63.6	62.5	1.8	389.8	366.3	6.4
39	37	G&K International , Zurich	NA	61.3	61.9	-1.0	398.2	377.5	5.5
40	39	Orikomi Advertising , Tokyo	NA	58.7	57.5	2.0	487.6	440.0	10.8
41	41	Earle Palmer Brown Cos. , Bethesda, Md.	Earle Palmer Brown Cos	57.2	54.1	5.7	454.7	415.6	9.4
42	44	Hill, Holliday, Connors, Cosmopolis , Boston	Hill, Holliday, Connors, Cosmopolis	55.0	50.1	9.9	367.0	333.9	9.9
43	45	Chuo Senko Advertising Co. , Tokyo	NA	52.8	50.0	5.6	382.9	369.2	3.7
44	50	DIMAC Direct , Bridgeton, Mo.	DIMAC Direct	52.5	44.9	16.9	138.8	107.8	28.8
45	43	CDP Europe , London	NA	51.0	50.5	1.1	378.6	354.2	6.9
46	46	Admarketing , Los Angeles	Admarketing	50.8	48.5	4.6	317.2	277.2	14.4
47	42	W.B. Doner & Co. , Southfield, Mich.	W.B. Doner & Co.	49.8	51.4	-3.1	395.3	395.4	-0.0
48	49	Hal Riney & Partners , San Francisco	Hal Riney & Partners	48.8	45.0	8.3	325.0	300.0	8.3
49	47	Ally & Gargano , New York	Ally & Gargano; Degani/Varley Communications	44.8	46.6	-4.4	363.7	383.1	-5.1
50	48	Oricom , Seoul	NA	43.8	46.2	-5.1	147.9	174.0	-15.0

Notes: Gross income and billings are in millions of U.S. dollars. Rank for '90 reflects advertising organization's current composition. The U.S.-based agency brands, in boldface, present only among multi-tiered holding companies, are major divisions. Companies in the Top 50 hold minority equity in each other as follows: Foot, Cone & Belding Communications owns 49% of Publicis-FCB Communications; Omnicom Group owns 46.67% of Clemenger/BBDQ; Young & Rubicam and Dentsu each own 50% of Dentsu, Young & Rubicam Partnerships; Dai-ichi Kikaku Co. owns 10.69% of FCA Group. Profiles of the Top 50 and their holdings begin on Page S-24. See Page S-20 for methodology.

Slow growth

(Continued from Page S-1)
operation, the network's second-largest shop. International results improved 1.3% at Lintas-Worldwide, which got flat returns from the U.K., France and Germany and a 14.6% decline from Brazil where it bought MPM Propaganda, that country's largest agency. The new cruzado's decline of 74.9% against the dollar wreaked havoc on returns of many of the large multinational agencies in Brazil.

The composition of agencies on the consolidated chart, AA's traditional chart for ranking agencies, differs from that of the Top 50 advertising organizations in that the consolidated agencies are individual segments of these advertising organizations.

Agency struggles in the U.S. have centered more on the large than the small shop. Gross income among the Top 50 U.S. brand agencies (those billing \$200 million or more) grew only 1.9%, while the remaining shops increased an aggregate 4.7% (AA, April 6).

U.S. media volumes, dominated in most cases by the big shops, have taken a beating. Network TV, the leading recipient of agency billings, pulled \$10.3 billion from brand agencies, down 0.8% from these agencies in the prior year. Saatchi supplanted Burnett as the No. 1 buyer, spending \$809.4 million, up 3%, to Burnett's \$800 million, down 10.5%.

Saatchi also remained on top in spot TV buying by spending \$515.5 million, up 3%, and in consumer magazines, spending \$297.8 million, up 3%.

Foote, Cone & Belding Communications wrestled the spot radio crown from D'Arcy Masius Benton & Bowles despite being down 13.2% to \$111.5 million.

Cable TV grew 11.2% and farm publications 12.1%, the only two among the 14 media monitored to gain more than 10%. □

Discs open up agency database

CHICAGO—Advertising Age has created two new software data packages for information-hungry marketing and media professionals.

Based on data compiled for this Agency Report, the discs contain domestic and international agency databases.

Agency billings figures, media breakdowns, gross income, volume, employee data, etc., covering more than 500 U.S.-based agencies are available for \$600.

A database on more than 1,000 non-U.S. shops includes gross income, billings and equity investments by multinational agency networks. It also is being offered for \$600. When purchased together, the total cost is \$1,000.

The packages are available in popular spreadsheet and database formats.

To obtain additional information, or to place an order, contact Greg Bauer, Midwest sales manager, Advertising Age, at (312) 649-5304 or Kevin Brown, associate editor, at (312) 649-5272 in Chicago. □

U.S.-based consolidated agencies

Subsidiary returns in parent totals

Rank 1991 1990	Agency, headquarters	Total consolidated gross income			Total consolidated capitalized billings			
		1991	1990	% chg	1991	1990	% chg	
Agencies ranked by worldwide gross income								
1	1	Young & Rubicam, New York	\$980.8	\$1,001.4	-2.1	\$7,331.4	\$7,519.3	-2.5
2	2	Saatchi & Saatchi Advertising Worldwide, New York	829.2	814.6	1.8	5,665.7	5,566.0	1.8
3	4	McCann-Erickson Worldwide, New York	811.6	757.0	7.2	5,413.5	5,049.4	7.2
4	3	Ogilvy & Mather Worldwide, New York	794.9	775.3	2.5	5,520.7	5,374.8	2.7
5	6	BBDO Worldwide, New York	772.8	723.8	6.8	5,408.7	5,221.7	3.6
6	5	Lintas:Worldwide, New York	729.7	736.2	-0.9	4,887.2	4,937.4	-1.0
7	7	J. Walter Thompson Co., New York	727.0	690.7	5.3	5,048.8	4,852.3	4.0
8	8	DOB Needham Worldwide, New York	698.4	625.2	11.7	5,034.3	4,591.5	9.6
9	9	Backer Spielvogel Bates Worldwide, New York	630.4	618.9	1.9	4,266.3	4,200.6	1.6
10	11	Foote, Cone & Belding Communications, Chicago	616.0	543.4	13.4	4,651.0	4,390.1	5.9
11	10	Grey Advertising, New York	615.1	583.3	5.5	4,142.7	3,910.4	5.9
12	13	Leo Burnett Co., Chicago	576.6	531.8	8.4	3,890.6	3,585.4	8.5
13	12	D'Arcy Masius Benton & Bowles, New York	534.6	532.5	0.4	4,509.3	4,406.7	2.3
14	14	Bozell, New York	221.0	213.4	3.6	1,660.0	1,570.0	5.7
15	15	Lowe Group, New York	220.4	196.5	12.1	1,551.4	1,302.3	11.4
16	16	N W Ayer, New York	171.3	185.9	-7.9	1,361.1	1,469.2	-7.4
17	19	TBWA Advertising, New York	144.8	132.6	9.2	1,001.9	919.0	9.0
18	17	Chiat/Day/Mojo, Venice, Calif.	137.7	137.0	0.5	999.9	992.0	0.8
19	18	Ketchum Communications, Pittsburgh	127.2	134.2	-5.2	978.8	1,030.4	-5.0
20	20	Campbell-Mithun-Esty, Minneapolis	122.2	120.3	1.6	906.8	892.5	1.6
21	21	Ross Roy Group, Bloomfield Hills, Mich.	105.1	106.0	-0.9	700.5	707.0	-0.9
22	22	Wells Rich Greene BDDP, New York	105.0	105.0	0.0	923.7	845.0	9.3
23	23	Scali, McCabe, Sloves, New York	91.1	102.5	-11.1	631.1	694.8	-9.2
24	24	Della Femina, McNamee, New York	85.6	94.2	-9.2	713.0	782.0	-8.8
25	25	TMP Worldwide, New York	65.3	55.8	17.0	435.3	371.9	17.0
Agencies ranked by U.S. gross income								
1	1	Young & Rubicam, New York	\$425.3	\$450.6	-5.6	\$3,464.8	\$3,696.4	-6.3
2	2	BBDO Worldwide, New York	371.9	370.4	0.4	2,716.8	2,672.8	1.6
3	3	Saatchi & Saatchi Advertising Worldwide, New York	371.6	350.5	6.0	2,566.1	2,420.5	6.0
4	4	Ogilvy & Mather Worldwide, New York	322.4	321.7	0.2	2,242.5	2,219.7	1.0
5	6	DOB Needham Worldwide, New York	306.4	297.8	2.9	2,452.5	2,407.9	1.9
6	7	Foote, Cone & Belding Communications, Chicago	299.6	287.6	4.2	2,536.3	2,539.3	-0.1
7	5	Leo Burnett Co., Chicago	299.1	299.3	-0.1	2,040.3	2,035.2	0.3
8	9	D'Arcy Masius Benton & Bowles, New York	276.6	276.7	0.0	2,611.4	2,510.9	4.0
9	8	J. Walter Thompson Co., New York	272.5	285.2	-4.5	1,919.0	2,010.7	-4.6
10	11	Grey Advertising, New York	269.9	256.3	5.3	1,800.2	1,710.0	5.3
11	10	Lintas:Worldwide, New York	254.8	267.3	-4.7	1,719.6	1,810.0	-5.0
12	13	McCann-Erickson Worldwide, New York	224.2	210.1	6.7	1,495.1	1,401.4	6.7
13	12	Backer Spielvogel Bates Worldwide, New York	205.1	213.0	-3.7	1,407.0	1,460.1	-3.6
14	14	Bozell, New York	164.8	163.9	0.5	1,285.0	1,240.0	3.6
15	16	Campbell-Mithun-Esty, Minneapolis	122.2	120.3	1.6	906.8	892.5	1.6
16	15	Ketchum Communications, Pittsburgh	112.2	121.3	-7.5	878.5	944.0	-6.9
17	17	Ross Roy Group, Bloomfield Hills, Mich.	105.1	106.0	-0.9	700.5	707.0	-0.9
18	18	Wells Rich Greene BDDP, New York	105.0	105.0	0.0	923.7	845.0	9.3
19	21	Chiat/Day/Mojo, Venice, Calif.	91.8	91.1	0.8	704.9	697.0	1.1
20	20	Della Femina, McNamee, New York	85.6	94.2	-9.2	713.0	782.0	-8.8
21	19	N W Ayer, New York	80.2	99.4	-19.3	754.4	892.2	-15.4
22	22	Lowe Group, New York	79.2	79.0	0.3	610.3	609.0	0.2
23	24	TMP Worldwide, New York	61.4	52.8	16.3	409.1	351.7	16.3
24	23	Scali, McCabe, Sloves, New York	58.5	66.4	-11.9	409.6	454.2	-9.8
25	28	Hill, Holliday, Connors, Cosmopolis, Boston	53.6	46.1	16.2	357.3	307.5	16.2
Agencies ranked by Non-U.S. gross income								
1	2	McCann-Erickson Worldwide, New York	\$587.5	\$546.9	7.4	\$3,918.4	\$3,648.0	7.4
2	1	Young & Rubicam, New York	555.5	550.8	0.9	3,866.6	3,823.0	1.1
3	3	Lintas:Worldwide, New York	474.9	468.9	1.3	3,167.6	3,127.4	1.3
4	5	Ogilvy & Mather Worldwide, New York	472.5	453.6	4.2	3,278.1	3,155.1	3.9
5	4	Saatchi & Saatchi Advertising Worldwide, New York	457.6	464.1	-1.4	3,099.6	3,145.5	-1.5
6	6	J. Walter Thompson Co., New York	454.5	405.5	12.1	3,129.8	2,841.6	10.1
7	7	Backer Spielvogel Bates Worldwide, New York	423.6	404.3	4.8	2,896.2	2,729.6	6.1
8	8	BBDO Worldwide, New York	400.9	353.4	13.4	2,691.9	2,548.8	5.6
9	9	DOB Needham Worldwide, New York	391.9	327.4	19.7	2,581.8	2,183.6	18.2
10	10	Grey Advertising, New York	345.2	327.0	5.6	2,342.5	2,200.4	6.5
11	12	Foote, Cone & Belding Communications, Chicago	316.4	255.8	23.7	2,114.7	1,850.8	14.3
12	13	Leo Burnett Co., Chicago	277.5	232.5	19.4	1,850.3	1,550.3	19.4
13	11	D'Arcy Masius Benton & Bowles, New York	258.0	255.9	0.8	1,897.9	1,895.8	0.1
14	14	Lowe Group, New York	141.2	117.5	20.1	941.1	783.3	20.1
15	15	TBWA Advertising, New York	99.2	90.4	9.7	698.1	637.7	9.5
16	16	N W Ayer, New York	91.1	86.5	5.3	606.7	577.0	5.1
17	17	Bozell, New York	56.3	49.5	13.6	375.0	330.0	13.6
18	18	Chiat/Day/Mojo, Venice, Calif.	45.9	45.9	0.0	295.0	295.0	0.0
19	19	Scali, McCabe, Sloves, New York	32.6	36.1	-9.6	221.5	240.7	-8.0
20	20	Ketchum Communications, Pittsburgh	15.0	13.0	16.1	100.3	86.4	16.1

Notes: Dollars are in millions. Rankings in 1990 reflect agency's current composition. Total agency gross income and capitalized billings include returns from the following:
Backer Spielvogel Bates Worldwide: AC&R Advertising, Kots & Draft
BBDO Worldwide: Baxter, Gurnan & Mazzei, Frank J. Corbett Inc., Doremus & Co., Lavey-Wolff-Swift, Tracy-Locke, Rapp Collins Marcora (50%)
D'Arcy Masius Benton & Bowles: Medius Intercon International, Clarion Marketing & Communications, Manning, Selvage & Lee (public relations)
DOB Needham Worldwide: Bernhard Hodes Group, Kallir, Philips, Ross, Rapp Collins Marcora (50%)
Foote, Cone & Belding Communications: IMPACT, Vicom/FCB, FCB Direct/U.S., Wahlstrom & Co., Publicis-FCB Communications (49%)
Lintas-Worldwide: Dailey & Associates, Fahlgren Martin, Lintas Marketing Communications, G&S Lintas
McCann-Erickson Worldwide: McCann Direct, McCann Healthcare
Ogilvy & Mather Worldwide: Ogilvy & Mather Direct Response, Ogilvy & Mather Public Relations, Ogilvy & Mather Yellow Pages, Thomson-Leeds, A. Eicoff & Co.
Saatchi & Saatchi Advertising Worldwide: Cadwell Davis Partners, Cliff Freeman & Partners, Conill Advertising, Kistner Advertising, Rumrill-Hoyt, Team One Advertising
Scali, McCabe, Sloves: Fallon McElligott, Martin Agency, Steinhilber Group
J. Walter Thompson Co.: Thompson Recruitment, Brouillard Communications, J. Walter Thompson Direct, J. Walter Thompson Healthcare
Young & Rubicam: Cato Johnson Worldwide, Chapman Direct, Suder & Hennessy, Crewel, Munsell, Fuhr & Zibel, Wunderman Worldwide, Dentis, Young & Rubicam Partnerships (50%), Burson-Marsteller (media-related billings only)

U.S. agency brands ranked by gross income

Rank	1991	1990	Agency, headquarters	U.S. gross income		U.S. billings	
				1991	% chg	1991	% chg
1	1	1	Leo Burnett Co., Chicago	\$299.1	-0.1	\$2,040.3	✓
2	2	2	Saatchi & Saatchi Advertising Worldwide, New York	286.3	3.0	1,908.9	✓
3	3	3	Grey Advertising, New York	269.9	5.3	1,800.2	✓
4	4	4	J. Walter Thompson Co., New York	234.0	-3.6	1,663.5	✓
5	5	5	Foots, Cone & Belding Communications, Chicago	228.9	3.2	2,032.0	✓
6	6	6	Ogilvy & Mather Worldwide, New York	224.8	2.0	1,571.7	✓
7	10	10	McCann-Erickson Worldwide, New York	212.5	6.3	1,417.1	✓
8	7	7	Young & Rubicam, New York	212.4	-1.9	2,026.6	✓
9	8	8	BBDO Worldwide, New York	211.4	1.8	1,554.0	✓
10	9	9	D'Arcy Masius Benton & Bowles, New York	202.2	-1.0	2,050.3	✓
11	11	11	DDG Needham Worldwide, New York	197.4	2.9	1,588.7	✓
12	12	12	Backer Spielvogel Bates Worldwide, New York	161.8	-5.2	1,078.4	✓
13	13	13	Bozell, New York	157.0	1.0	1,230.0	✓
14	14	14	Lintas/Worldwide, New York	149.0	0.0	993.7	✓
15	16	16	Campbell-Mithun-Esty, Minneapolis	122.2	1.6	906.8	✓
16	15	15	Ketchum Communications, Pittsburgh	112.2	-7.5	878.5	✓
17	17	17	Wells Rich Greene BDDP, New York	105.0	0.0	923.7	✓
18	19	19	Della Femina, McNamee, New York	85.6	-9.2	713.0	✓
19	20	20	Chiat/Day/Mojo, Venice, Calif.	81.6	-0.4	637.0	✓
20	18	18	NW Ayer, New York	80.2	-19.3	754.4	✓
21	21	21	Ross Roy Inc., Bloomfield Hills, Mich.	67.1	1.6	447.0	✓
22	22	22	TMP Worldwide, New York	61.4	16.3	409.1	✓
23	23	23	Tracy-Locke, Dallas	54.5	-4.5	395.4	✓
24	27	27	Hill, Holliday, Connors, Cosmopolis, Boston	53.6	16.2	357.3	✓
25	30	30	DIMAC Direct, Bridgeton, Mo.	52.5	16.9	138.8	✓
26	25	25	Earle Palmer Brown Cos., Bethesda, Md.	51.6	6.4	417.4	✓
27	24	24	Admarking, Los Angeles	50.8	4.6	317.2	✓
28	29	29	Hal Riney & Partners, San Francisco	48.8	8.3	325.0	✓
29	28	28	Lowe & Partners, New York	45.7	0.4	325.3	✓
30	32	32	TBWA Advertising, New York	45.6	8.0	303.7	✓
31	26	26	Lintas/Marketing Communications, New York	44.8	-7.2	298.7	✓
32	33	33	Jordan, McGrath, Case & Taylor, New York	42.2	2.9	350.0	✓
33	34	34	McCaffrey & McCall, New York	40.0	-0.7	266.5	✓
34	31	31	W.B. Doner & Co., Southfield, Mich.	39.0	-8.5	296.8	✓
35	37	37	Ogilvy & Mather Direct, New York	37.4	3.3	233.0	✓
36	54	54	Ferguson Communications Group, Parsippany, N.J.	37.0	45.8	173.1	✓
37	36	36	Wunderman Worldwide, New York	36.2	-5.1	241.4	✓
38	35	35	Ally & Gargano, New York	35.2	-7.9	303.0	✓
39	39	39	Laurence, Charles, Free & Lawson, New York	33.5	0.0	285.0	✓
40	44	44	Tatham/RSCG, Chicago	33.4	16.6	324.7	✓
41	41	41	Ammirati & Paris, New York	32.5	6.4	250.0	✓
42	43	43	Lois/USA, New York	32.0	6.7	237.0	✓
43	52	52	Happ Collins Maroon, New York	31.3	23.0	260.3	✓
44	71	71	Avrett, Free & Ginsberg, New York	30.2	56.4	245.0	✓
45	45	45	FCB Direct/U.S., Chicago	30.1	5.8	201.0	✓
46	56	56	Medicus Intercon International, New York	27.9	14.6	227.7	✓
47	49	49	Sudler & Hennessey, New York	27.571	6.0	183.8	✓
48	55	55	Nelson Communications, New York	27.569	9.3	183.9	✓
49	66	66	Tone One Advertising, El Segundo, Calif.	27.525	33.3	183.5	✓
50	128	128	Messner Velez Berger Carey Schmetterer, New York	27.247	160.2	207.8	✓
51	48	48	Clarion Marketing & Communication, Greenwich, Conn.	26.809	3.0	202.1	✓
52	47	47	Evans Communications, Salt Lake City	26.800	0.4	178.5	✓
53	62	62	Berry Network, Dayton, Ohio	26.783	25.8	147.0	✓
54	53	53	Tarlow Advertising, New York	25.679	1.2	192.9	✓
55	82	82	Klemmer Advertising, New York	25.500	44.9	165.1	✓
56	40	40	Nationwide Advertising Service, Cleveland	25.481	-19.0	169.9	✓
57	64	64	Richards Group, Dallas	25.050	19.9	180.1	✓
58	57	57	Keller-Crescent Co., Evansville, Ind.	24.169	1.2	121.4	✓
59	51	51	Warwick Baker & Fione, New York	24.000	-6.8	160.0	✓
60	46	46	Cato Johnson Worldwide, New York	23.891	-15.1	159.5	✓
61	42	42	Bernard Hodes Group, New York	23.533	-22.1	156.9	✓
62	60	60	Kallir, Phillips, Ross, New York	23.471	5.8	186.2	✓
63	68	68	Kobs & Draft, Chicago	23.385	16.1	155.9	✓
64	38	38	Scall, McCabe, Sloves, New York	22.879	-36.6	160.6	✓
65	50	50	Dailley & Associates, Los Angeles	22.875	-11.9	173.8	✓
66	72	72	Margoties Ferlitta & Weiss, New York	22.399	16.8	145.7	✓
67	63	63	Griffin Bacal, New York	22.246	4.5	173.8	✓
68	75	75	William Douglas McAdams, New York	22.245	18.6	155.5	✓
69	67	67	Lavey/Wolf/Swift, New York	21.639	6.1	144.3	✓
70	58	58	Fahlgren Martin, Parkersburg, W. Va.	21.605	-6.8	142.9	✓
71	111	111	Wieden & Kennedy, Portland, Ore.	20.600	63.5	165.0	✓
72	74	74	Rosenfeld, Sirowitz, Humphrey & Strauss, New York	20.250	6.3	135.0	✓
73	70	70	GSD&M, Austin, Texas	20.063	0.4	149.5	✓
74	69	69	Bloom FCA, New York	20.000	0.0	189.1	✓
75	61	61	AC&R Advertising, New York	19.881	-10.1	172.7	✓
76	78	78	Geer, DuBois, New York	19.500	8.3	150.0	✓
77	73	73	Esaman, Johns & Laws, Los Angeles	19.214	0.4	146.8	✓
78	83	83	Rubin Postner & Associates, Santa Monica, Calif.	19.188	9.8	180.7	✓
79	80	80	Bayer Bess Vanderwerker, Chicago	19.117	7.0	125.3	✓
80	65	65	Lord, Dentsu & Partners, New York	18.955	-9.2	151.6	✓
81	85	85	Venet Advertising, Union, N.J.	18.735	11.3	124.9	✓
82	114	114	Barry Blau & Partners, Fairfield, Conn.	18.697	51.0	127.0	✓
83	84	84	Cramer-Krasselt, Milwaukee	18.475	8.8	126.3	✓
84	59	59	Thompson Recruitment, Los Angeles	18.068	-19.0	119.0	✓
85	90	90	Tucker Wayne/Luckie & Co., Atlanta	18.014	16.3	131.2	✓
86	141	141	Goodby, Berlin & Silverstein, San Francisco	17.586	85.3	117.3	✓
87	76	76	Meldrum & Fawcett Communications, Cleveland	17.423	-6.1	116.2	✓
88	88	88	Davis Ball & Colombatto, Los Angeles	17.395	5.0	155.2	✓
89	99	99	VICOM/FCB, San Francisco	17.363	21.4	148.4	✓
90	81	81	The Martin Agency, Richmond, Va.	17.352	-2.7	116.0	✓
91	79	79	Weightman Group, Philadelphia	17.100	-5.0	114.0	✓
92	101	101	Bernstein-Rein Advertising, Kansas City, Mo.	17.064	21.5	135.4	✓
93	96	96	Chapman Direct, New York	16.978	13.1	113.2	✓
94	91	91	Calet, Hirsch & Spector, New York	16.800	9.1	112.0	✓
95	89	89	Partners & Shoveck, New York	16.765	5.4	171.9	✓
96	108	108	Fallon McElligott, Minneapolis	16.639	29.2	126.1	✓
97	77	77	Direct Marketing Group, New York	16.488	-9.8	131.9	✓
98	87	87	Wyse Advertising, Cleveland	16.100	-3.0	139.0	✓
99	92	92	M.E.D. Communications, Woodbridge, N.J.	15.736	2.9	103.0	✓
100	119	119	Gross Townsend Frank Hoffman, New York	15.700	34.2	104.7	✓

Notes: Dollars are in millions.

Rank	1991	1990	Agency, headquarters	U.S. gross income		U.S. billings	
				1991	% chg	1991	% chg
101	86	86	Ingalis, Quinn & Johnson, Boston	\$15,428.0	-7.4	\$139,027.0	✓
102	98	98	Carmichael Lynch, Minneapolis	15,295.9	6.3	109,700.0	✓
103	94	94	Bowes Dentsu & Partners, Los Angeles	15,140.0	0.0	97,100.0	✓
104	97	97	Valentine-Radford Communications, Kansas City, Mo.	15,098.2	3.1	100,635.8	✓
105	93	93	Cadwell Davis Partners, New York	15,060.0	-0.8	100,400.0	✓
106	104	104	Rumrill-Hoyt, Rochester, N.Y.	14,895.0	11.5	99,351.0	✓
107	131	131	Dove Direct Marketing & Advertising, Berwyn, Pa.	14,800.0	43.7	99,100.0	✓
108	105	105	Martin-Williams Advertising, Minneapolis	14,600.0	9.8	119,000.0	✓
109	109	109	Mullen Advertising, Wenham, Mass.	14,431.5	12.8	96,210.0	✓
110	127	127	Kresser Craig D.I.K., Santa Monica, Calif.	13,824.0	30.2	92,165.7	✓
111	121	121	U.S. Communications Corp., Minneapolis	13,674.0	19.6	91,236.0	✓
112	106	106	McKinney & Silver, Raleigh, N.C.	13,611.4	3.3	90,750.3	✓
113	145	145	Frankfurt Lips & Kind, New York	13,200.0	41.9	85,000.0	✓
114	95	95	Long, Haymes & Carr, Winston-Salem, N.C.	13,142.2	-12.8	87,657.0	✓
115	102	102	Cabot Communications, Boston	12,978.6	-5.5	86,567.0	✓
116	161	161	Arnold Fortuna Lane & Co., Boston	12,832.1	56.1	85,589.7	✓
117	118	118	Noble Communications, Springfield, Mo.	12,573.4	7.4	89,063.7	✓
118	107	107	A. Eicoff & Co., Chicago	12,500.0	-3.1	99,900.0	✓
119	124	124	Goldberg Moser O'Neill, San Francisco	12,150.0	11.0	81,000.0	✓
120	117	117	Cliff Freeman & Partners, New York	12,120.0	2.3	80,800.0	✓
121	133	133	Frank J. Corbett Inc., Chicago	11,883.0	16.3	79,259.9	✓
122	156	156	Fogarty & Klein/Winius Brandon, Houston	11,850.4	39.9	87,388.6	✓
123	222	222	Girgomi, Hughes, Butler & McDowell, New York	11,800.0	131.4	78,700.0	✓
124	126	126	IMPACT, Chicago	11,676.0	9.8	77,879.0	✓
125	135	135	Hamilton, Carver & Lee, Chicago	11,650.0	17.7	73,800.0	✓
126	113	113	Wahlstrom & Co., Stamford, Conn.	11,550.0	-7.2	77,000.0	✓
127	125	125	Liggett-Stashower, Cleveland	11,505.3	5.6	74,400.0	✓
128	100	100	Doremus & Co., New York	11,489.8	-18.6	86,456.9	✓
129	116	116	Dentsu America, New York	11,408.1	-3.9	80,497.7	✓
130	120	120	Grace & Rothschild, New York	11,400.0	-2.2	76,000.0	✓
131	115	115	Asher/Gould Advertising, Los Angeles	11,100.0	-8.6	74,000.0	✓
132	150	150	Rotando, Lerch & Iafelice, Stamford, Conn.	10,862.0	25.0	85,800.0	✓
133	169	169	Cline, Davis & Mann, New York	10,615.0	37.4	76,665.4	✓
134	220	220	Lewis & Gace, Fort Lee, N.J.	10,597.8	105.5	83,064.7	✓
135	137	137	Richardson, Myers & Donohue, Baltimore	10,586.5	9.0	67,900.0	✓
136	144	144	Jack Levy Associates, Chicago	10,306.9	10.7	68,724.4	✓
137	155	155	Frankenberry, Laughlin & Constable, Milwaukee	10,300.0	20.9	68,400.0	✓
138	112	112	Eric Mower & Associates, Syracuse, N.Y.	10,205.3	-18.8	70,643.8	✓
139	129	129	Gray Kirk/Van Sant Advertising, Baltimore	10,200.0	-2.0	75,500.0	✓
140	147	147	Anderson & Lemke, New York	10,190.0	12.0	67,940.0	✓
141	134	134	William Cook Agency, Jacksonville, Fla.	10,182.1	-0.3	70,940.7	✓
142	138	138	Goodwin, Dannenbaum, Littman & Wingfield, Houston	10,045.0	4.1	68,335.5	✓
143	142	142	Ackerman Hood & McQueen, Oklahoma City	10,042.6	6.3	75,542.0	✓
144	139	139	Dorritie Lyons & Nickel, New York	9,856.8	2.6	60,505.5	✓
145	140	140	Henderson Advertising, Greenville, S.C.	9,755.0	2.6	75,036.0	✓
146	153	153	Lally, McFarland & Pantello, New York	9,500.0	11.2	77,600.0	✓
147	130	130	Cole & Weber, Seattle	9,476.4	-8.6	83,245.7	✓
148	172	172	MARC Advertising, Pittsburgh	9,399.5	23.5	62,694.7	✓
149	122	122	Brouillard Communications, New York	9,360.9	-15.9	62,437.0	✓
150	146	146	Berenter Greenhouse & Webster, New York	9,330.0	1.5	67,526.0	✓
151	123	123	Robinson, Yesawich & Peppardine, Orlando, Fla.	9,324.2	-15.4	62,192.3	✓
152	157	157	Dugan/Farley Communications, Upper Saddle River, N.J.	9,300.0	10.3	60,700.0	✓

U.S. agency brands (continued)

Rank	1991	1990	Agency, headquarters	U.S. gross income		U.S. billings	
				1991	% chg	1991	
201	182		Grant/Jacoby, Chicago	\$6,100.0	-10.3	\$56,845.0	✓
202	213		McDougall Associates, Peabody, Mass.	6,096.0	13.2	36,150.0	
203	201		Jordan Tamraz Caruso Advertising, Chicago	6,083.3	5.4	40,557.9	
204	193		Abelson-Taylor, Chicago	6,060.3	0.3	46,503.6	
205	257		Brierley & Partners, Dallas	6,039.0	45.9	45,764.0	✓
206	210		Cranford Johnson Robinson Woods, Little Rock, Ark.	6,016.7	10.2	40,131.5	✓
207	194		CHC Advertising, Woodbridge, N.J.	6,000.0	0.0	45,510.0	
208	206		Kolon, Bittker & Desmond, Troy, Mich.	5,850.0	4.5	37,800.0	
209	215		Cohen/Johnson, Los Angeles	5,835.0	9.1	55,426.4	✓
210	208		Publicis, New York	5,809.4	5.6	48,895.8	✓
211	203		Wolf, Mansfield, Boiling, Buffalo, N.Y.	5,780.0	2.2	42,050.0	
212	188		Gilbert, Whitney & Johns, Whippany, N.J.	5,775.0	-8.3	38,500.0	
213	231		Puskas Gibson Chapin, Dallas *	5,750.0	16.5	46,000.0	
214	190		Mintz & Hoke, Avon, Conn.	5,732.0	-7.6	38,213.0	✓
215	202		Ad Team, North Miami Beach, Fla.	5,660.0	0.0	37,450.0	
216	204		Adler Boschetto Peebles & Partners, New York	5,638.2	-0.2	46,528.7	✓
217	191		Babbitt & Reiman Advertising, Atlanta *	5,613.9	-8.0	46,396.0	
218	239		Ted Thomas Associates, Philadelphia	5,495.5	19.2	46,077.8	✓
219	235		Harris-Drury-Cohen, Fort Lauderdale, Fla.	5,476.0	16.8	36,507.0	✓
220	233		Albert Frank-Guenther Law, New York	5,405.0	12.7	36,053.0	✓
221	266		Hedgate Communications, Vero Beach, Fla.	5,396.0	36.1	36,561.1	
222	207		Hoffman, York & Compton, Milwaukee	5,358.4	-2.9	40,746.5	
223	242		Yaffe & Co., Southfield, Mich.	5,313.4	16.6	35,422.0	✓
224	245		Larkin, Meeder & Schweidel, Dallas	5,308.4	17.7	35,407.2	✓
225	216		Cox Landey & Partners, New York	5,250.0	0.0	35,000.0	
226	217		McFarland & Drier, Miami *	5,250.0	0.0	42,000.0	
227	246		Stern Advertising, Pepper Pike, Ohio	5,250.0	16.7	35,000.0	✓
228	227		Floathe Johnson Associates, Kirkland, Wash.	5,247.1	5.5	36,550.5	✓
229	238		Marcus Advertising, Cleveland	5,243.2	13.4	42,715.9	✓
230	250		Karsh & Hagan, Englewood, Colo.	5,157.8	19.0	33,376.4	✓
231	228		Baxter, Gurian & Mazzell, Beverly Hills, Calif.	5,100.0	2.9	34,200.0	✓
232	316		Herring Newman, Seattle	5,078.5	78.0	33,999.3	
233	226		Schutte & Co., Buffalo, N.Y.	5,054.0	0.2	42,459.5	✓
234	225		Bonneville Communications, Salt Lake City	4,989.0	-1.2	33,039.0	
235	236		Marquardt & Roche, Stamford, Conn.	4,956.0	5.8	33,040.3	
236	240		Gordon Bailey & Associates, Stone Mountain, Ga.	4,956.0	7.6	32,742.0	✓
237	234		Wolf Blumberg Krody, Cincinnati	4,953.0	4.9	33,036.4	✓
238	264		Food Group, New York	4,920.0	23.3	31,000.0	
239	229		Chernoff/Silver & Associates, Columbia, S.C.	4,886.8	-1.3	27,973.7	✓
240	263		Reimel Carter Advertising, Philadelphia	4,878.0	20.1	26,523.0	✓
241	241		Berline Group, Birmingham, Mich.	4,875.0	6.6	32,500.0	
242	224		Jayne Organization, Cleveland	4,739.4	-6.7	37,095.3	✓
243	312		Lotus Minard Patton McIver, New York	4,720.0	58.7	35,808.5	
244	252		Sullivan Higdon & Sink, Wichita, Kan.	4,715.7	10.7	40,897.7	
245	244		Taylor Smith, Houston	4,708.1	4.0	31,400.0	
246	297		Shelly Berman Communications, Westerville, Ohio	4,679.2	46.0	39,920.6	✓
247	218		Lord, Sullivan & Yoder, Columbus, Ohio	4,645.0	-10.6	35,880.2	✓
248	214		Bender, Browning, Dolby & Sanderson, Chicago	4,620.9	-14.0	30,813.4	✓
249	296		Creative Alliance, Louisville	4,597.8	43.4	45,415.8	✓
250	280		Salthouse-Torre-Norton, Rutherford, N.J.	4,587.5	29.2	58,264.1	✓
251	232		Doe-Anderson Advertising, Louisville	4,566.3	-7.2	34,287.9	✓
252	254		Franklin Spier Inc., New York	4,549.3	8.2	30,344.0	✓
253	192		Gearon Hoffman Conlon & Nye, Boston	4,546.5	-24.8	29,554.0	
254	248		Stone, August, Baker Communications, Troy, Mich.	4,544.5	2.3	29,832.3	
255	256		McCann Healthcare, Chicago *	4,500.0	7.1	30,000.0	✓
256	261		Warner, Bicking, Morris & Partners, New York *	4,480.0	9.6	29,254.1	
257	269		Lawrence Butler Advertising, New York	4,364.3	15.3	29,096.6	✓
258	258		Conill Advertising, New York	4,336.0	5.5	28,000.0	
259	260		Glennon & Co., St. Louis	4,282.0	4.5	31,384.0	
260	223		Stone & Simons, Southfield, Mich.	4,257.5	-16.4	30,534.8	
261	243		Marketing Support, Chicago	4,245.4	-6.4	38,392.5	✓
262	197		Campbell & Wagman, Los Angeles	4,245.0	-26.9	28,300.0	✓
263	212		Paolin & Sweeney, Cherry Hill, N.J.	4,200.0	-22.2	24,000.0	✓
263	309		Simmons, Durham & Associates, St. Louis	4,200.0	40.0	28,014.0	✓
265	237		Salvati Montgomery Sakoda, Costa Mesa, Calif.	4,119.6	-11.0	27,477.7	✓
266	249		Keroff & Rosenberg Advertising, Chicago	4,075.4	-7.3	38,535.4	✓
267	272		Quest Business Agency, Houston	4,063.6	10.3	26,334.5	
268	310		J. Walter Thompson Direct, New York *	4,050.0	35.0	27,000.0	✓
269	255		Walter Bennett Communications, Dallas *	4,000.0	-4.8	27,500.0	
269	259		Steinert & Associates, New York	4,000.0	-2.4	27,530.0	
271	265		Stan Merritt Inc., New York	3,973.0	0.0	29,000.0	
272	277		Advertising Works, Honolulu	3,900.0	8.3	26,000.0	
273	293		Peck Sims Mueller, Honolulu	3,895.3	20.8	25,973.8	✓
274	267		Leslie Advertising Agency, Greenville, S.C.	3,889.6	-1.1	27,381.1	✓
275	247		Simons Michelson Zieve, Troy, Mich.	3,875.0	-12.9	27,500.0	✓
276	274		Gerber Advertising, Portland, Ore.	3,874.6	5.5	25,830.3	✓
277	278		Forsythe Marcelli Johnson, Newport Beach, Calif.	3,813.7	6.3	26,453.8	✓
278	347		Shain Colavito Pensabene Direct, New York	3,807.0	67.6	25,446.0	✓
279	287		Sandler Communications, New York	3,750.8	11.9	25,686.7	✓
280	289		Clarity Coverdale Rueff Advertising, Minneapolis	3,750.0	13.6	24,960.0	✓
280	NA		Cosmopolis Crowley Daly/CKG, Boston	3,750.0	NA	25,000.0	
282	285		Stephan & Brady, Madison, Wis.	3,740.1	9.8	30,580.5	✓
283	286		Duffy & Shanley, Providence, R.I.	3,714.1	9.4	24,773.3	✓
284	295		Hitchcock-Fleming & Associates, Akron, Ohio	3,696.0	15.1	25,290.6	✓
285	313		Stromberg-Connors Communications, Rye Brook, N.Y.	3,675.0	23.5	10,500.0	
286	251		Juhl Marketing/Communications, Mishawaka, Ind.	3,660.0	-14.8	24,149.8	✓
287	303		Rainoldi Kerzner Radcliffe, San Francisco	3,652.6	18.4	25,041.0	✓
288	282		Hallmark Advertising, Pittsburgh	3,650.0	4.3	21,180.0	
289	253		Lauerer Markin Gibbs, Maumee, Ohio	3,604.0	-15.0	25,080.2	
290	308		ICE Communications, Rochester, N.Y.	3,600.0	20.0	24,000.0	
290	362		Kupper Advertising, St. Louis	3,600.0	78.2	29,753.4	
292	275		Lockhart & Pettus, New York	3,589.0	-1.8	23,927.0	✓
293	322		Wakeman & deForrest Corp., Irvine, Calif.	3,549.0	30.2	19,876.0	
294	330		Louis London, St. Louis	3,534.7	42.6	25,478.4	✓
295	290		Barnhart Advertising & PR, Denver	3,525.1	7.8	24,754.2	
296	311		Arian, Lowe & Travis Advertising, Chicago	3,512.9	18.0	31,323.3	✓
297	283		S.J. Weinstein Associates, New York	3,500.0	0.0	23,350.0	
298	200		GS&B-Lintas, Coral Gables, Fla.	3,437.2	-41.1	22,926.1	✓
299	279		Lyons Inc., Wilmington, Del.	3,354.8	-5.6	21,547.2	✓
300	291		Ross Advertising, St. Louis	3,345.1	3.4	22,143.5	✓

Notes: Dollars are in thousands

Rank	1991	1990	Agency, headquarters	U.S. gross income		U.S. billings
				1991	% chg	1991
301	298		Gumpertz/Bentley/Fried, Los Angeles	\$3,302.7	4.1	\$25,636.2
302	273		Newmark, Posner & Mitchell, New York	3,300.6	-10.2	23,315.7
303	344		Mandelbaum Mooney Ashley, San Francisco *	3,263.0	42.5	26,100.0
304	288		Tausche Martin Lonsdorf, Atlanta	3,259.6	-2.4	21,735.8
305	292		E. James White Co., Herndon, Va.	3,230.0	0.0	21,600.0
306	299		Finnegan & Agee, Richmond, Va.	3,175.5	1.9	22,254.0
307	281		Hoffman/Lewis, Oakland, Calif.	3,169.0	-10.0	22,824.0
308	301		St. George Group, Pittsburgh	3,146.0	1.9	24,799.0
309	375		Kingswood Advertising, Ardmore, Pa.	3,125.2	67.1	20,845.0
310	338		Omon New York, New York *	3,125.0	31.6	25,000.0
311	271		Tassani Communications, Chicago	3,124.9	-16.0	21,555.1
312	276		Fitzgerald & Co., Atlanta	3,112.9	-13.9	20,639.2
313	294		Goldfarb Hoff & Co., Southfield, Mich.	3,073.6	-4.5	20,260.1
314	268		Sawyer Riley Compton, Atlanta	3,030.1	-22.4	26,972.6
315	262		Hadden Advertising, Chicago	3,017.0	-26.0	21,000.0
316	329		Michael & Partners, Dallas	3,010.0	20.5	20,077.0
317	327		Kuhn & Wittenborn, Kansas City, Mo.	3,008.5	15.0	20,066.3
318	307		Bailey Klempner & Medrich, Ann Arbor, Mich.	3,000.0	0.0	19,900.0
319	315		Responsive Marketing Communications, Schaumburg, Ill.	2,995.8	4.2	18,831.0
320	284		Dudnyk Co., Horsham, Pa.	2,988.5	-14.2	22,128.4
321	317		NKH&W, Kansas City, Mo.	2,988.4	5.0	21,400.0
322	306		Waldbillig & Besteman, Madison, Wis.	2,983.3	-1.0	19,608.6
323	270		Harris, Balo & McCullough, Philadelphia	2,974.4	-20.5	22,052.6
324	302		McKone & Co., Irving, Texas	2,941.9	-4.7	19,622.7
325	337		Loeffler Ketchum Moutley, Charlotte, N.C.	2,935.7	21.7	19,580.8
326	348		Campbell Group, Baltimore	2,917.8	28.5	18,836.0
327	318		Smith, Badofsky & Raffel, Chicago	2,902.7	2.0	18,712.9
328	304		Sefton Associates, Grand Rapids, Mich.	2,897.3	-6.0	19,318.5
329	336		Harris & Love, Salt Lake City	2,841.4	17.7	18,906.9
330	321		Jason Group, Short Hills, N.J. *	2,783.4	2.1	16,470.0
331	325		Letven/Dicicco, Horsham, Pa.	2,755.8	3.6	18,659.8
332	323		E.H. Brown Advertising, Chicago	2,754.9	1.9	18,365.8
333	319		Gardner Communications, San Francisco	2,683.0	-5.6	17,892.0
334	361		Pagano Schenck & Kay, Providence, R.I.	2,627.9	29.5	17,408.0
335	314		Brady Company, Menomonee Falls, Wis.	2,606.2	-10.7	17,383.2
336	334		Swanson Russell Associates, Lincoln, Neb.	2,564.5	5.1	16,736.4
337	328		Lipman, Richmond, Greene, New York	2,551.2	0.0	14,908.7
338	345		Stiegler, Wells & Brunswick, Bethlehem, Pa.	2,550.0	11.6	16,600.0
339	379		FKO Advertising, Clearwater, Fla.	2,546.7	43.2	17,091.4
340	324		Lieberman-Appalucci, Allentown, Pa.	2,542.9	-4.4	18,159.4
341	342		Gigante Vaz & Partners, Parsippany, N.J.	2,500.0	8.0	16,668.5
342	350		Meyer & Wallis, Milwaukee	2,494.0	16.7	16,484.5
343	370		M&H Advertising, Minneapolis	2,460.0	27.7	13,827.4
344	356		New England Advertising Associates, Norwalk, Conn.	2,374.2	14.3	15,835.9
345	339		Chester Gore Co., New York	2,371.3	0.8	15,808.8
346	426		BelMed Advertising, Harrison, N.Y.	2,370.0	93.3	14,952.0
347	352		Maris West & Baker, Jackson, Miss.	2,344.3	10.9	15,608.9
348	341		Sturm Communications Group, Chicago	2,300.0	-1.3	15,880.0
349	326		Sandven & Associates, Overland Park, Kan.	2,297.7	-12.8	17,968.7
350	351		John Risdall Advertising, New Brighton, Minn.	2,280.2	7.0	14,442.7
351	333		CDHM Advertising, Stamford, Conn. *	2,248.0	-8.4	14,600.0
352	357		J. Malek Inc., New York	2,241.7	8.8	14,887.9
353	346		Rick Johnson & Co., Albuquerque, N.M.	2,209.0	-2.7	12,581.0
354	358		Gerbig, Snell/Weisheimer & Associates, Worthington, Ohio	2,200.0	7.7	18,467.0
355	NA		Lewis Communications, Mobile, Ala.	2,184.0	NA	14,690.8
356	349		Morton Goldberg Associates, New York *	2,176.4	-3.3	13,946.0
357	367		Falcone & Assoc. Marketing Communications, Chatham, N.J.	2,173.7	9.4	14,256.6
358	331		Dudreck DePaul Fico & Morgan, Pittsburgh	2,164.0	-12.6	15,363.0
359	343		Townsend Agency, Rosemont, Ill.	2,116.4	-8.3	14,155.3
360	373		Fotheringham & Associates, Salt Lake City	2,111.4	11.2	16,359.8
361	400		Ad-Tech Communications, Miami Lakes, Fla.	2,100.0	40.0	14,000.0
362	360		Bailey Lauerman & Associates, Lincoln, Neb.	2,099.2	3.3	13,627.7
363	300		Decker Rickard, Glastonbury, Conn.	2,093.0	-32.5	10,245.0
364	393		McCormick Advertising, Amarillo, Texas	2,090.2	31.8	13,482.6
365	365		Hal Langerman Co., Blue Bell, Pa.	2,083.4	4.8	13,810.5
366	371		D.P.L. Advertising, Battle Creek, Mich.	2,048.1	7.4	6,705.2
367	380		Advertising, Boelter & Lincoln, Madison, Wis.	2,024.4	13.8	18,452.8
368	381		Ovation Marketing, LaCrosse, Wis.	2,005.3	15.7	13,375.6
369	364		Edgar S. Spizel Advertising & PR, La Jolla, Calif.	2,000.0	0.0	13,340.0
370	369		Harmon Smith, Kansas City, Mo.	1,992.3	1.3	16,027.2
371	372		Edward G. Dorn & Associates, Rolling Meadows, Ill. *	1,986.4	4.3	15,280.0
372	332		John Volk Co., Chicago	1,971.6	-19.9	13,295.3
373	353		Cronin & Co., Glastonbury, Conn.	1,965.0	-6.9	15,297.0
374	354		Lou Beres & Associates, Chicago *	1,964.0	-6.6	13,100.0
375	368		David K. Burnap Advertising, Dayton, Ohio	1,954.6	-1.4	17,110.7
376	418		Pierson & Flynn, Chicago	1,947.0	51.1	12,609.1
377	305		Siddall, Matus & Coughler, Richmond, Va.	1,940.8	-36.9	17,903.5
378	384		Saunders, Lubinski & White, Dallas	1,940.6	17.3	18,857.9
379	340		Berenson, Isham & Partners, Boston	1,894.6	-19.3	9,971.6
380	366		Wendt Advertising Agency, Great Falls, Mont.	1,874.7	-5.7	12,554.7
381	335		Penny/Ohlmann/Neiman, Dayton, Ohio	1,868.8	-23.1	20,056.6
382	377		Penny & Speier, Houston	1,854.5	0.0	16,857.8
383	398		Fletcher, Gampper & Wirth, Kansas City, Mo.	1,854.1	21.1	14,122.9
384	422		Thomson-Leeds, New York	1,845.0	48.2	12,300.0
385	376		Dana Communications, Hopewell, N.J.	1,837.3	-1.2	12,126.2
386	412		Simms & McIvor Marketing Communications, Somerville, N.J.	1,802.9	31.1	12,324.0
387	401		Bryan, Brown & Malinsky, New Haven, Conn.	1,801.0	23.7	12,177.1
388	363		Phillips Miller Speyer & Frost, Amityville, N.Y.	1,779.7	-11.7	11,346.3
389	374		Launey, Hachmann & Harris, New York	1,764.8	-6.8	11,500.0
390	436		Hively Agency, Houston	1,755.8	68.3	11,522.4
391	397		San Jose & Associates, Chicago	1,754.7	14.1	11,501.7
392	392		Winterkorn Lillis, Rochester, N.Y.	1,715.4	8.1	5,829.2
393	385		MCCommunications, Dallas *	1,695.0	2.7	11,300.0
394	391		Ogilvy & Mather Yellow Pages, Pleasantville, N.Y.	1,680.0	5.7	11,200.0
395	386		Grant Marketing Communications, Lafayette Hill, Pa.	1,625.9	0.0	11,004.5
396	355		Roni Hicks & Associates, San Diego, Calif.	1,614.7	-23.1	10,619.5
397	435		Kobs Gregory & Passavant, Chicago	1,601.1	52.2	10,678.8
398	359		Sargent & Potratz, Brookfield, Wis.	1,585.6	-22.3	10,429.5
399	417		Creative Direct Response, Crofton, Md.	1,578.5	21.2	19,213.7
400	408		Haselow & Associates, Mayfield Heights, Ohio	1,567.4	11.4	10,454.8

U.S. agency brands (continued)

Rank	1991	1990	Agency, headquarters	U.S. gross income 1991	% chg	U.S. billings 1991	
401	378		Eidson Spear Watson & Dickerson, Shawnee Mission, Kan.	\$1,566.2	-15.4	\$10,434.3	✓
402	404		Cascino Purcell Freebairn, Atlanta	1,562.3	8.9	10,415.6	✓
403	449		R.F. Broadus & Associates, Atlanta	1,550.0	74.2	10,135.9	✓
403	421		Quality & Co., Chicago	1,550.0	24.0	9,750.0	✓
405	403		Gray Baumgarten Layport, Pittsburgh	1,544.2	7.5	10,116.8	✓
406	395		Gibbons & Dickens, San Jose, Calif.	1,527.8	-1.4	10,855.3	✓
407	382		Meoycks Benckstein Associates, Des Moines, Iowa	1,527.6	-10.2	11,943.2	✓
408	414		Hiebing Group, Madison, Wis.	1,524.1	11.6	11,587.3	✓
409	416		Zubi Advertising Services, Miami	1,515.6	15.3	9,816.2	✓
410	389		Significs, Rochester, N.Y.	1,489.0	-7.3	9,931.5	✓
411	394		Donald L. Arends Inc., Oak Brook, Ill.	1,470.0	-7.0	9,800.5	✓
412	458		Poliak Levitt Chaiet Advertising, Atlanta	1,438.8	81.3	9,595.1	✓
413	390		Semel/Kaye & Co., Northbrook, Ill.	1,435.6	-10.4	8,549.9	✓
414	399		Sullivan & Brownell, Randolph, Vt.	1,418.1	-5.7	8,894.6	✓
415	396		Beckman Meany, Albany, N.Y.	1,409.2	-8.6	9,915.4	✓
416	NA		VAMCOM Advertising, Morris Plains, N.J.	1,400.0	NA	9,200.0	✓
417	431		Kopf Zimmermann Schulteis, Melville, N.Y.	1,378.6	22.9	9,097.0	✓
418	NA		Paige-Smith Group, Syracuse, N.Y.	1,364.1	NA	9,537.7	✓
419	NA		Carter Waxman Advertising & PR, San Jose, Calif.	1,363.3	NA	9,044.1	✓
420	388		Sage Marcom, Syracuse, N.Y.	1,355.8	-15.7	9,602.3	✓
421	432		Harris Advertising, Ann Arbor, Mich.	1,353.9	23.4	8,519.4	✓
422	407		Martiz & Wadas, Scottsdale, Ariz.	1,343.5	-4.8	10,210.5	✓
423	420		Forman Roth Advertising, New York	1,327.7	4.7	8,773.8	✓
424	419		Lortz Direct Marketing, Omaha, Neb.	1,323.7	3.8	15,000.9	✓
425	442		Halblich/Beggs, Louisville, Ky.	1,312.2	31.9	8,279.5	✓
426	320		Harant Scoglian Marketing, Washington	1,310.1	-52.1	8,734.1	✓
427	NA		Marketing Group, Feasterville, Pa.	1,295.6	NA	8,568.7	✓
428	424		Nemer, Fieger & Associates, Minneapolis	1,292.8	4.6	8,612.1	✓
429	406		Burris Agency, High Point, N.C.	1,279.0	-10.1	7,737.0	✓
430	387		Adair-Greene Advertising, Atlanta	1,278.5	-21.3	10,870.5	✓
431	415		Beaumont, Heller & Sperling, Reading, Pa.	1,277.1	-6.0	8,965.4	✓
432	428		Vinod Gupta Advertising Co., Omaha, Neb.	1,275.1	8.1	7,900.0	✓
433	445		BBK, Chestnut Hill, Mass.	1,269.8	34.6	8,048.8	✓
434	429		Daniel Glassman Advertising, Fairfield, N.J.	1,255.0	7.3	7,700.0	✓
435	413		Coakley Hengerty Cos., San Jose, Calif.	1,237.8	-9.6	10,073.4	✓
436	423		Littlefield Marketing & Advertising, Tulsa, Okla.	1,220.3	-1.8	8,139.1	✓
437	447		Shepler/CoDA & Co., Hickory, N.C.	1,213.8	29.8	5,629.2	✓
438	383		J.P. Hogan & Co., Knoxville, Tenn.	1,195.5	-29.2	8,696.1	✓
439	409		Landers & Partners, St. Petersburg, Fla.	1,161.9	-17.3	9,105.2	✓
440	451		Douglas Samuel Advertising, Montville, N.J.	1,149.4	32.4	5,829.6	✓
441	405		Kurtzman/Slavin/Linda, Northfield, Ill.	1,133.0	-20.4	7,543.2	✓
442	430		Asatsu America, Los Angeles	1,130.0	0.3	6,972.0	✓
443	425		Leasing-Flynn Advertising Co., Des Moines, Iowa	1,128.0	-8.5	7,011.1	✓
444	468		Creative Concepts in Advertising, Boca Raton, Fla.	1,112.6	64.9	7,167.4	✓
445	446		Saxton Communications Group, New York	1,103.3	17.0	7,359.1	✓
446	433		Adelante Advertising, New York	1,073.6	0.0	7,034.5	✓
447	434		Topin & Associates, Chicago	1,062.5	0.0	8,500.0	✓
448	NA		Wyble Advertising, Millville, N.J.	1,060.4	NA	7,001.7	✓
449	443		Marontate & Co., Auburn Hills, Mich.	1,058.0	7.3	10,632.0	✓
450	448		Richardson, Thomas & Bushman, Blue Bell, Pa.	1,056.0	17.1	6,101.0	✓
451	438		Smith Lask Associates, Chicago	1,044.9	1.8	6,897.6	✓
452	440		Phillips, Gianettino & Meredith, New York	1,041.3	4.1	6,839.9	✓
453	453		Geoghegan/Griffiths, Cincinnati	1,030.1	20.4	7,029.9	✓
454	439		Thielen & Associates, Fresno, Calif.	1,024.1	2.2	6,711.9	✓
455	401		Sanna, Mattson, MacLeod & Macri, Smithtown, N.Y.	1,013.8	-27.6	6,655.2	✓
456	459		Lardis, McCurdy & Co., Meriden, Conn.	969.0	22.2	6,908.0	✓
457	411		Pierce-Davis & Associates, Arlington, Texas	960.3	-30.3	7,740.7	✓
458	402		Nordenson Lynn & Associates, Tucson, Ariz.	891.4	-38.6	6,085.1	✓
459	441		Communicators Group, Brattleboro, Vt.	884.8	-11.2	6,996.0	✓
460	437		George P. Clarke Advertising, New York	881.6	-15.0	5,828.9	✓
461	444		Carl Bloom Associates, New York	872.5	-9.5	2,908.3	✓
462	456		Perry Ballard Advertising, St. Joseph, Mich.	862.0	4.7	5,237.0	✓
463	460		Sader & Associates, New York	833.5	5.5	5,556.6	✓
464	475		Patterson Advertising Agency, Topeka, Kan.	819.1	32.9	5,365.0	✓
465	457		Sheldon Fredericks Advertising, Stamford, Conn.	818.1	0.4	5,297.9	✓
466	454		Grob & Co., Cambridge, Mass.	818.0	-2.2	5,455.6	✓
467	474		Praco, Colorado Springs, Colo.	801.8	27.2	5,216.4	✓
468	466		Detrow & Underwood, Ashland, Ohio	777.3	14.0	5,081.7	✓
469	465		Scopes-Garcia-Carlisle, Salt Lake City	773.9	11.7	6,497.3	✓
470	NA		Phoenix Advertising, Brookfield, Wis.	768.4	NA	5,074.0	✓
471	450		Tri-State Advertising Co., Warsaw, Ind.	751.8	-14.2	4,919.5	✓
472	463		Ad-Pro, Sycamore, Ill.	739.3	0.6	4,918.5	✓
473	461		Richard Yeager Associates, Moorestown, N.J.	724.5	-8.1	4,827.3	✓
474	452		Polesse Clancy, Boston	722.8	-16.6	5,172.9	✓
475	427		Graff Advertising, Palo Alto, Calif.	714.1	-41.1	3,967.0	✓
476	455		FitzSimons Advertising & PR, Cleveland	690.7	-16.1	4,606.4	✓
477	500		Haynes & Pittenger Direct, Indianapolis	689.3	134.2	5,681.4	✓
478	473		Jiloty Communications, Holly Hill, Fla.	687.0	7.5	4,525.0	✓
479	471		Polindexter Associates Advertising, Roanoke, Va.	680.3	2.2	4,437.4	✓
480	467		Don Wise & Co., New York	675.0	0.0	4,500.0	✓
481	470		Kocs, Wesson & Associates, Brookfield, Wis.	674.5	1.0	4,500.0	✓
482	485		G. Duff Associates, Somerville, N.J.	672.0	38.3	4,200.0	✓
483	479		Barbeau-Hutchings Advertising, Ramsey, N.J.	660.0	19.8	1,850.0	✓
484	481		Hinton & Steel, Seattle	657.4	27.6	4,953.7	✓
485	469		Bramson & Associates, Los Angeles	650.0	-3.7	3,900.0	✓
486	476		Kinzie & Green, Wausau, Wis.	636.5	7.6	4,126.4	✓
487	462		Sullivan-St. Clair Advertising, Mobile, Ala.	630.3	-19.7	3,444.5	✓
488	NA		Innis Maggiore Group, Canton, Ohio	629.3	NA	4,055.8	✓
489	472		Pettus Advertising, Corpus Christi, Texas	610.3	-6.5	3,914.1	✓
490	483		Opus Group, Ridgewood, N.J.	602.1	19.9	3,802.5	✓
491	464		Brashe Advertising, Jericho, N.Y.	596.9	-15.4	3,979.1	✓
492	488		Villing & Co., Mishawaka, Ind.	580.5	26.9	3,801.7	✓
493	478		DFK Advertising, New York	563.0	0.0	3,700.3	✓
494	480		Ashby Dillon, Rocky River, Ohio	539.8	1.5	4,152.0	✓
495	498		MWA Direct, Minneapolis	512.0	61.7	3,415.1	✓
496	486		Exclamation Point Advertising, Billings, Mont.	499.3	3.6	3,722.9	✓
497	489		R.J. Hunter & Associates, Exton, Pa.	495.0	15.7	3,307.0	✓
498	482		MSA Advertising, Philadelphia	494.8	-2.9	3,196.1	✓
499	484		Tucker Chicago, Schaumburg, Ill.	483.5	-1.8	3,187.9	✓
500	493		Neff & Associates, Philadelphia	479.6	22.5	2,826.0	✓

Notes: Dollars are in thousands.

Rank	1991	1990	Agency, headquarters	U.S. gross income 1991	% chg	U.S. billings 1991	
501	518		Concepts & Strategies, Westport, Conn.	\$458.7	NA	\$3,011.0	✓
502	487		Weber, Geiger & Kalat, Dayton, Ohio	456.5	-3.9	2,961.8	✓
503	492		Fruchman & Rosen, Toledo, Ohio	449.5	11.7	2,928.2	✓
504	490		CTS Advertising, Dearborn, Mich.	449.3	6.2	2,996.6	✓
505	495		DK Group, Hillsdale, N.J.	447.1	20.9	2,974.0	✓
506	477		Marken Communications, Santa Clara, Calif.	372.5	-34.3	2,483.9	✓
507	491		Fingerstein & Fingerstein, Monterey, Calif.	353.5	-15.8	2,557.8	✓
508	NA		Dickson & Hendon Advertising, Westport, Conn.	350.8	NA	2,339.6	✓
509	496		William Mills Agency, Atlanta	343.9	-4.6	1,965.4	✓
510	497		Clarke Advertising & PR, Sarasota, Fla.	332.4	3.2	2,215.7	✓
511	494		Bruce Novograd Advertising, New York	325.0	-16.7	2,167.0	✓
512	502		Stevens Inc., Grand Rapids, Mich.	312.5	25.0	2,500.0	✓
513	501		Coreille Direct, Norwalk, Conn.	304.0	7.2	2,005.0	✓
514	503		Integrated Advertising Communications, Farmington Hills, Mich.	259.7	5.5	1,647.0	✓
515	499		Intersouth Creative Group, Tampa, Fla.	254.4	-19.4	1,232.2	✓
516	504		Creel Associates, Oak Brook, Ill.	240.2	5.8	1,623.0	✓
517	505		Adams & Longino Advertising, Greenville, N.C.	211.1	-2.9	1,491.4	✓
518	506		Zises Advertising, New York	165.7	-4.3	1,091.8	✓
519	512		Adteam, New York	153.2	42.1	1,021.4	✓
520	509		NPC & Associates, Landover, Md.	144.8	10.9	957.0	✓
521	510		Hicks & Associates, Coral Gables, Fla.	130.6	0.4	738.4	✓
522	511		George Blake & Associates, Sarasota, Fla.	130.0	13.0	927.5	✓
523	508		Keller Haver Lipman, New York	112.5	-24.5	750.0	✓
524	NA		Frederick Studio, Chicago	102.1	NA	679.0	✓
525	515		Mills Marketing, Los Angeles	94.3	-1.0	843.5	✓
526	513		Shea & Ziegler, Darien, Conn.	79.1	-21.6	539.3	✓
527	507		David Arnold Design, Cardiff-by-the-Sea, Calif.	71.5	-56.1	460.4	✓
528	514		Wilson, Frank & Associates, San Diego	70.0	-30.0	350.0	✓
529	517		McAndrew Advertising Co., Bronx, N.Y.	58.2	13.7	342.8	✓
530	516		Bar-Dell & Associates, Jonesboro, Ark.	54.4	-21.0	350.1	✓
531	519		Morris Direct Marketing, Bronxville, N.Y.	32.9	118.6	162.8	✓
532	520		Phil Varchetta & Associates, Chicago	13.3	45.2	106.0	✓

Notes: Dollars are in thousands. ✓ indicates that the agency received signature of an independent accountant verifying figures supplied to AA. * indicates that gross income figures are AA estimates. 1990 rankings are computed from figures reported in 1991. See Page S-20 for methodology.

AA Chart: Kathy Weirky

How 'ad organizations,' agencies are ranked

This Agency Report spins numbers into three separate rankings: The World's Top 50 Advertising Organizations; the leading U.S. agency "brands"; and the top U.S.-based agencies on a consolidated basis.

Each ranking is based on gross income and equity. Gross income is revenue and includes the sum of commissions on media billings, the markup on materials and services (usually 17.65%) and fee income.

All returns from agencies or holding companies are treated on an equity basis, which allows an agency to claim only the exact percentage it owns in another.

World's Top 50 advertising organizations

The evolving corporate restructuring blurring the distinction between agencies and holding companies last year led AA to create the first ranking of the World's Top 50 Advertising Organizations (Page S-10).

Until recently, an agency was an operating company and a holding company wasn't. The former makes ads; the latter doesn't. Seems simple enough.

But the new European and U.S. configurations that emerged during the late 1980s demonstrate the difference between agency and holding company often is in name only.

A classic example of this fusion is the advertising handled by Euro RSCG principals at the holding company level. These executives pitch and manage individual accounts (France Telecom, for example) as if the executives were running an operating agency. Such business is maintained for tax reasons.

The Euro RSCG example may be extreme, but it has company. FCA Group and BDP Worldwide are both agency and holding company. Leo Burnett Co., an operating company in the U.S., directs foreign units through an international holding company.

An ad organization qualifies for a Top 50 ranking if it owns 50%+ of itself. It's then ranked on 100% of its equity gross income. The portion not owned can be claimed by another organization on the Top 50 chart.

The one exception to this rule is No. 23 Dentsu, Young & Rubicam Partnerships. It's a 50/50 joint venture between Dentsu and Y&R, each of which claims its 50% equity.

U.S. agency brands

The ranking of 532 U.S. agencies (beginning on Page S-24) is by agency "brand," where subsidiaries are unbundled from parent totals to get at the core agency—usually its collection of brand shops bearing the agency name.

The procedure, enabling both agency and subsidiary to be charted without duplication, in effect ranks agencies purely by advertising. Among mega-merger agencies, this means gross income stripped of contributions from specialty units such as direct response, PR, research, pharmaceutical, sales promotion or Yellow Pages.

Many advertisers don't seek a creative agency because they own specialty units that operate independently from the core agency.

To identify which agencies and/or specialty shops were omitted to arrive at a core shop, see footnote at the bottom of U.S.-based consolidated agencies chart (Page S-12). The units listed as part of an agency's consolidated totals in this chart were eliminated from the parent in the brand chart. The concept remains controversial, especially among multitermed agencies trying to become "seamless" despite the separate identities some of their units maintain.

Eventually, AA hopes to carry the agency brand concept into the international arena. Seeking brands on a U.S. basis presents its own difficulties, but working with agencies from 80 countries poses additional problems. U.S. agencies often are reluctant to provide returns at the subsidiary level and to concede that certain subsidiaries are autonomous.

Consolidated U.S. agencies

The ranking of the top U.S.-based agencies on a consolidated basis (Page S-12) allows the multitermed agencies to include all their subsidiaries and specialty units. A list of these varied operations is presented at the bottom of the ranking. These units also comprise the operations that were extracted to form the brand. In virtually all cases, the multitermed agency provided individual returns for each operation. No non-media activity is included in the figures.

U.S. media rankings

The Top 10 agencies in each U.S. media category (Page S-40) are ranked by their media volume at the brand level. For example, the network TV total for category-leader Saatchi & Saatchi Advertising Worldwide doesn't include any TV

World's Top 50 advertising organizations

WPP Group remains No. 1 with gross income of \$2.66 billion

RANK: 46

Admarketing

Los Angeles
Gross income: \$50.8 million

Organization totals (\$ in millions)

	1991	1990	% chg
Worldwide			
Gross income	\$50.8	\$48.5	4.6
Volume	\$317.2	\$277.2	14.4
Employees	138	136	1.5
Offices	1	1	0.0

Notes: Results do not include the agency's package goods operation, Superior Brands, a soup company which had \$7.9 million in billings in 1991 vs. \$8.3 million in 1990. Worldwide returns in tables are all from the U.S.

Officers: Jack Roth, president-coo, Martin B. Cagan, exec vp
Headquarters: Admarketing/1801 Century Park East/Los Angeles, Calif. 90067/Phone: (310) 203-8400

RANK: 49

Ally & Gargano

New York
Gross income: \$44.6 million

Organization totals (\$ in millions)

	1991	1990	% chg
Worldwide			
Gross income	\$44.6	\$40.6	9.8
Volume	\$363.7	\$383.1	-5.1
Employees	275	310	-11.3
Offices	3	3	0.0

Notes: Ally & Gargano's returns include figures in both years for 100%-owned medical agency Dugan/Farley Communications, purchased in December 1991. AA estimated A&G's totals. Worldwide returns above are all from the U.S.

Officers: Warren Dechter, pres., William Luceno, coo
Headquarters: Ally & Gargano/805 Third Ave./New York, N.Y. 10022/Phone: (212) 688-5300

Dugan Farley Communications

	1991	1990	% chg
Worldwide			
Gross income	\$9.3	\$8.4	10.3
Volume	\$60.7	\$55.1	10.1
Employees	80	75	6.7
Offices	1	1	0.0

Officer: E. John Farley, pres-coo
Headquarters: Dugan/Farley Communications Assoc./600 E. Crescent Ave./Upper Saddle River, N.J. 07458/Phone: (201) 934-0720

RANK: 30

Asahi Advertising

Tokyo
Gross income: \$96.7 million

Organization totals (\$ in millions)

	1991	1990	% chg
Worldwide			
Gross income	\$96.7	\$88.9	8.8
Volume	\$582.1	\$522.7	11.4
Employees	802	782	2.6
Offices	27	27	0.0

Notes: Worldwide returns in tables are all from Japan.
Officers: Tokushiro Misawa, pres-coo, Hiroshi Miyazawa, sr mg dir, Masaaki Iwakura, sr mg dir, Hideyuki Hashimoto, sr mg dir
Headquarters: Asahi Advertising/2-16, Kyobashi 3-Chome, Chuo-Ku/Tokyo 104, Japan/Phone: 813-3274-1371/Fax: 813-3272-7349

RANK: 19

Asatsu

Tokyo
Gross income: \$166.2 million

Organization totals (\$ in millions)

	1991	1990	% chg
Worldwide			
Gross income	\$166.2	\$140.7	18.1
Volume	\$1,194.0	\$1,018.0	17.3
Employees	1,109	1,064	4.2
Offices	17	17	0.0

Asatsu America

	1991	1990	% chg
U.S.			
Gross income	\$1.1	\$1.1	0.3
Volume	\$7.0	\$7.6	-8.2
Employees	15	15	0.0
Offices	1	1	0.0

Asian offices
Asatsu, Tokyo (NA) 1,060.5
Asatsu International, Hong Kong (MJ) 12.6

Notes: Results include returns for both years of Nihon Bungei-Sha, a Tokyo-based publishing company. The unit had \$16.9 million in gross income on \$63.3 million in billings in 1991.

Officers: Masao Inagaki, pres-coo, Ichiro Ohta, sr mg dir, Shinya Miyata, pres-Asatsu America
Headquarters: Asatsu/1-9-6, Shimbashi, Minato-ku/Tokyo 105, Japan/Phone: 813-3575-2921/Fax: 813-3574-6748

Asatsu America/10960 Wilshire Blvd., Suite 1600/Los Angeles, Calif. 90024/Phone: (310) 444-4718

RANK: 18

N W Ayer

New York
Gross income: \$171.3 million

Organization totals (\$ in millions)

	1991	1990	% chg
Worldwide			
Gross income	\$171.3	\$185.9	-7.9
Volume	\$1,361.1	\$1,469.2	-7.4
Employees	1,821	2,032	-10.4
Offices	29	24	20.8

U.S.
Gross income \$80.2
Volume \$59.4
Employees 594
Offices 4

U.S. offices
Ayer South West, Dallas 48.5
Ayer Tittle, Los Angeles 13.5
N W Ayer, New York 635.0
N W Ayer, Detroit 46.1
N W Ayer, Chicago 11.3

Asian offices
Lee Davis Ayer Advertising, Hong Kong (MJ) 13.1

European offices
Ayer France, Paris (MN) 130.8
Ayer Italy, Milan (MJ) 56.8
Ayer Netherlands, Dordrecht (MJ) 18.0

Ayer Portugal, Lisbon (MN) 4.4
Ayer U.K., London (MJ) 74.6
Ayer Werbeagentur, Frankfurt (MJ) 21.2
TAPSA/N W Ayer, Madrid (MJ) 291.7
Wilkins Ayer, Hamburg (MJ) 146.2

Latin American offices
Ayer Vasquez, Buenos Aires (MN) 0.0
Canadian offices
McKin Advertising, Toronto (MN) 165.7

Notes: Dallas 1991 returns are through October when the agency was closed following the loss of J.C. Penney Co. Ayer sold its New Zealand shop and its 49% equity in McKim Advertising, Toronto, in 1991 and 1992, respectively.

Officers: Jerry J. Siano, chmn-coo, Thomas F. Maxey, vice chmn-coo, Patrick J. Cunningham, vice chmn-chief creative officer, Dominick F. Rossi Jr., pres-Ayer U.S.A.
Headquarters: N W Ayer/825 Eighth Ave./New York, N.Y. 10019/Phone: (212) 474-5000

RANK: 14

BDDP

Worldwide
Boulogne, France
Gross income: \$277.0 million

Organization totals (\$ in millions)

	1991	1990	% chg
Worldwide			
Gross income	\$277.0	\$236.0	17.4
Volume	\$1,941.3	\$1,625.4	19.4
Employees	2,645	2,600	1.7
Offices	80	70	14.3

U.S.
Gross income \$73.5
Volume \$42.0
Employees 650
Offices 7

Asian offices
Batey Communications Group, Singapore (MN) 87.6

European offices
Ajans Ultra Reklam, Istanbul (NE) 5.9
AKA BDDP, Rotterdam (MJ) 134.2
BDDP Belgium, Brussels (MJ) 20.8
BDDP France, Paris (MJ) 786.0
BDDP UK, London (MJ) 114.0

Holtkamp Mueller Kentenich & May, Dusseldorf (MJ) 25.9
Longart & Loman BDDP, Milan (MJ) 45.8
Miller & Levens W&H, London (MJ) 40.5
Solution BDDP, Madrid (MJ) 80.2

Notes: Organization returns in 1991 represent BDDP Worldwide's 70% holding in Wells Rich Greene BDDP, up from 40% equity in 1990. Local management holds the remaining 30% of the agency. In theory, privately held BDDP Worldwide "controls" that 30% of WRG

BDDP through a buyback clause. London shop equity increased from 55% in 1990 to 100% in 1991.

Officers: Jean-Claude Boulet, group chmn-coo, Jean-Marie Dru, chmn-coo, France, Ken Olschan, vice chmn, Nicholas Baum, intl mg dir
Headquarters: BDDP Worldwide/162-164 Rue de Billancourt/92100 Boulogne, France/Phone: 331-49-09-70-10/Fax: 331-49-09-72-32

Wells Rich Greene BDDP

	1991	1990	% chg
U.S.			
Gross income	\$105.0	\$105.0	0.0
Volume	\$928.7	\$845.0	9.9
Employees	695	700	-0.7
Offices	7	7	0.0

Officer: Ken Olschan, chmn-coo
Headquarters: Wells Rich Greene BDDP/9 West 57th St./New York, N.Y. 10019/Phone: (212) 303-5000

RANK: 15

Bozell, Jacobs, Kenyon & Eckhardt

New York
Gross income: \$221.0 million

Organization totals (\$ in millions)

	1991	1990	% chg
Worldwide			
Gross income	\$221.0	\$213.4	3.6
Volume	\$1,660.0	\$1,570.0	5.7
Employees	2,416	2,376	1.7
Offices	72	71	1.4

U.S.
Gross income \$154.8
Volume \$1,285.0
Employees 1,665
Offices 11

U.S. offices
Bozell, New York 11.1
Bozell, Tampa, Fla. 22.0
Bozell, Minneapolis 53.0
Bozell, Dallas 350.0
Bozell, Chicago 75.0
Bozell, New York 450.0
Bozell, Los Angeles 60.0
Bozell, Omaha 30.0
Bozell, Detroit 190.0

African offices
Louis Wiltschack Group, Johannesburg (NE) 11.9
Orientations Bozell, Jeddah (NE) 5.4

Asian offices
Amos Team Advertising, Bangkok (NE) 14.6
Arms Bozell, New Delhi (NE) 2.4
Atlas Bozell Advertising, Manila (NE) 1.7
Bozell, Peking (MJ) 12.4
Bozell, Hong Kong (MJ) 41.4
Bozell CCAA Advertising, Taipei (MN) 24.4
Bozell Maita, Tokyo (MN) 16.0
Bozell Rydye, Sydney (MJ) 5.5

Bozell, Seoul (MJ) 20.3
DDK Bozell, Singapore (MJ) 11.8
Grant Bozell International, Colombo (MN) 3.8
Minds Lanka, Colombo (MN) 0.6
Protoma Advertising, Jakarta (NE) 2.0

European offices
Biuro Reklam, Warsaw (NE) 0.5
Bozell Advertising, Amsterdam (MJ) 19.4
Bozell Advertising, Geneva (NE) 28.5
Bozell France, Paris (MJ) 64.7
Bozell Grant, Athens (NE) 4.7
Bozell International, Madrid (MJ) 12.6
Bozell Portugal, Lisbon (MJ) 12.4
Bozell Poyraz, Istanbul (NE) 2.7
Bozell Publicitas, Vienna (NE) 20.2
Bozell Testa Pella Rossetti, Milan (MJ) 71.5
Bozell Werbeagentur, Frankfurt (MJ) 32.9
Bozell Wymans Bogaerts, Brussels (MJ) 23.8
Cresteam, Frederiksberg (NE) 16.1
DFSD Bozell, London (MJ) 56.2
Kaupmanns-Bozell, Helsinki (MJ) 10.5
Quinn McDonnell Pattison, Dublin (NE) 13.6

Latin American offices
Bozell, Mexico City (MN) 44.3
Bozell CTV Advertising, Sanurco (MJ) 2.9
Campesini Publicidad, Panama City (NE) 4.1
Garcia Publicidad, Buenos Aires (NE) 24.1
J. Sanchez Asociados, Bogota (NE) 3.8
Harrison Publicidad, Sao Paulo (NE) 69.9
Prologo Bozell, Santiago (NE) 2.7
Vapra Publicidad, Caracas (NE) 6.8

Canadian offices
Bozell Palmer Sommer, Toronto (MJ) 35.5
Ydell HF, Reykjavik (NE) 2.5

Notes: BJK&E includes Bozell Inc. and Poppe Tyson. Bozell closed its Atlanta office in April 1991, citing economic reasons. Last month it sold Bozell Florida to management. Now called Ellis & Diaz, the agency remains affiliated with Bozell. Its numbers are in Bozell's totals.

Officers: Charles D. Peebler Jr., coo, J. Liener Temerlin, chmn, Leo Arthur Kelmenson, chmn-exec committee, David Bell, pres
Headquarters: Bozell/40 West 23rd St./New York, N.Y. 10010/Phone: (212) 727-5000

Poppe Tyson

	1991	1990	% chg
U.S.			
Gross income	\$7.8	\$8.4	-7.2
Volume	\$55.0	\$65.0	-15.4
Employees	76	86	-11.6
Offices	3	2	50.0

U.S. offices
Poppe Tyson, New York 17.0
Poppe Tyson, Los Angeles 4.0
Poppe Tyson, Morris Plains, N.J. 34.0

Officer: Fergus O'Daly, coo
Headquarters: Poppe Tyson/40 West 23rd St./New York, N.Y. 10010/Phone: (212) 727-5600

RANK: 41

Earle Palmer Brown Cos.

Bethesda, Md.
Gross income: \$57.2 million

Organization totals (\$ in millions)

	1991	1990	% chg
Worldwide			
Gross income	\$57.2	\$54.1	5.7
Volume	\$454.7	\$415.6	9.4
Employees	503	544	-7.5
Offices	10	12	-16.7

U.S. offices
Earle Palmer Brown, New York 24.9
Earle Palmer Brown, Tampa, Fla. 29.6
Earle Palmer Brown, Kalamazoo, Mich. 12.6
Earle Palmer Brown, Atlanta 34.0
Earle Palmer Brown, Bethesda, Md. 170.7
Earle Palmer Brown, Richmond, Va. 49.1
Earle Palmer Brown & Spies, Philadelphia 96.5

Notes: Included in the EPB returns are \$5.6 million in pre fees for both years. Worldwide returns in tables are all from the U.S.

Officers: Jeremy Brown, coo, Gary Jonas, pres-corporate, Mark Goldstein, pres-advertising, Gerry Van De Velde, sr vp-finance/accounting
Headquarters: Earle Palmer Brown Cos./6935 Arlington Rd./Bethesda, Md. 20814/Phone: (301) 637-6600

RANK: 11

Leo Burnett Co.

Chicago
Gross income: \$576.6 million

Organization totals (\$ in millions)

	1991	1990	% chg
Worldwide			
Gross income	\$576.6	\$531.8	8.4
Volume	\$3,890.6	\$3,585.4	8.5
Employees	6,327	5,883	7.5
Offices	50	43	16.3

U.S.
Gross income \$299.1
Volume \$2,040.3
Employees 2,395
Offices 1

Asian offices
Chaitra Advertising, Bombay (MN) 14.9
Hemisphere Leo Burnett Co., Manila (MJ) 12.2
Leo Burnett Conaghan & May, Sydney (MJ) 112.1
Leo Burnett Co., Singapore (MJ) 20.7
Leo Burnett Co., Bangkok (MJ) 35.3
Leo Burnett Co., Kuala Lumpur (MN) 22.0
Leo Burnett Co., Taipei (MJ) 19.2
Leo Burnett Co., Hong Kong (MJ) 75.2
Leo Burnett Sonyon, Seoul (NE) 7.1
Leo Burnett-Kyodo Co., Tokyo (MJ) 233.7
Leo Burnett-New Zealand, Wellington (MJ) 6.2

European offices
Bordolais, Lameuxier Leo Burnett, Paris (MJ) 110.2
Cinepointe Leo Burnett, Lisbon (MN) 17.2
Enterprise Middle East, Athens (MJ) 2.3
Leo Burnett Co., London (MJ) 266.6
Leo Burnett Co., Milan (MJ) 113.7
Leo Burnett Co., Athens (MJ) 34.6
Leo Burnett-Belgium, Brussels (MJ) 59.2
Leo Burnett-Denmark, Copenhagen (MJ) 26.0
Markom Leo Burnett, Istanbul (MN) 13.7
Michael Conrad & Leo Burnett, Frankfurt (MJ) 250.1
Nordviet & Wanninghoff Leo Burnett, Amsterdam (MJ) 75.5
Nordkar & Thoriksen Leo Burnett, Oslo (MN) 43.3
Vivrio Leo Burnett, Madrid (MN) 63.8

Latin American offices
Comunicacion Publicidad, Guatemala City (NE) 9.4
Leo Burnett Co., Buenos Aires (MJ) 13.8
Leo Burnett Co., San Juan (MJ) 3.8
Leo Burnett Co., Santo Domingo (MJ) 27.0
Leo Burnett Co., Mexico City (MJ) 57.6
Leo Burnett Publicidad, Sao Paulo (MJ) 73.5
Leo Burnett-Chile, Santiago (MJ) 12.6
Leo Burnett-Colombia, Bogota (MJ) 18.2
Leo Burnett-Venezuela, Caracas (MJ) 35.3
Publicidad Comercial, San Jose (MJ) 2.6

Other offices
Leo Burnett Co., Toronto (MJ) 115.6
AMA, Leo Burnett, Cairo (NE) 1.2
HAE Leo Burnett, Beirut (NE) 10.2
Radice Advertising, Manama (NE) 9.5
Targets Advertising, Jeddah (NE) 9.3

Notes: Burnett in late 1991 opened its fourth European outlet in Stockholm and acquired eq-

uity in Korean agency Sonyon Communications, Seoul. Sonyon and Burnett began working together in a loose affiliation in 1990.

Officers: Richard B. Fudale, chmn-coo-chief creative officer, William T. Lynch Jr., pres, John C. Kraft, vice chmn-coo
Headquarters: Leo Burnett Co./35 W. Wacker Dr./Chicago, Ill. 60601/Phone: (312) 220-5959

RANK: 45

CDP Europe

London
Gross income: \$51.0 million

Organization totals (\$ in millions)

	1991	1990	% chg
Worldwide			
Gross income	\$51.0	\$50.5	1.1
Volume	\$378.6	\$354.2	6.9
Employees	853	815	4.7
Offices	16	16	0.0

European offices
Alicia, Paris (V) 116.6
Barro CDP Europe, Madrid-Barcelona (MJ) 59.2
Barro Lixion, Lisbon (MN) 4.0
Borgesen, Copenhagen (NE) 18.2
Campaign Company, Amsterdam (NE) 29.3
Canard, Turn-Milani (MJ) 168.1
CDP Associates, Dublin (NE) 16.1
CDP & Partners, London (MJ) 173.9
Quattro, Brussels (MJ) 6.2
RPM Radar, Istanbul (MN) 13.6
Soren Blomberg, Stockholm (NE) 55.3
Travis Dale & Partners, London (MJ) 26.4

Notes: CDP Europe is a holding company led by agency CDP & Partners, London, the only shop in which it owns 100% Dentau Inc., Tokyo, owns 44.8% of CDP Europe, up from 30% in 1991.

Officers: John Salmon, chmn, Meg Numura, vice chmn, David Jones, dir-CDP Europe, coo-CDP & Partners
Headquarters: CDP Europe/116 Euston Rd./London NW1 2DQ, England/Phone: 4471-388-2424/Fax: 4471-380-1218

RANK: 29

Cheil Communications

Seoul
Gross income: \$101.6 million

Organization totals (\$ in millions)

	1991	1990	% chg
Worldwide			
Gross income	\$101.6	\$73.1	39.1
Volume	\$315.8	\$274.1	15.2

Canadian office
C/D/M Inc., Toronto(MJ)
Notes: C/D/M owns 100% of its agencies. Included in totals are non-media returns for both years from Bob Thomas & Associates, pr. The unit had fees of \$3.4 million in 1991, up 54.5% from 1990.
Officers: Jay Chait, chmn.-ceo, worldwide; Bob Wolf, chmn.-ceo, North America; Lee Chow, pres.-exec. creative dir., worldwide; Jane Newman, vice chmn.-North America.
Headquarters: Chait/Day/Mojo/340 Main St./Vancouver, Calif. 90291/Phone: (310) 414-5000

Anderson & Lembo			
	1991	1990	% chg
Gross income	\$10.2	\$9.1	12.0
Volume	\$67.9	\$60.7	11.9
Employees	65	55	18.2
Offices	2	2	0.0

U.S. offices
Anderson & Lembo, San Francisco 30.0
Anderson & Lembo, New York 37.9
Officers: Steve Tragg, chmn.
Headquarters: Anderson & Lembo/79 Fifth Ave., 7th Fl., New York, N.Y. 10003/Phone: (212) 888-2100

RANK: 43

Chuo Senko Advertising Co.

Tokyo
Gross income: \$52.8 million

Organization totals (\$ in millions)			
	1991	1990	% chg
Worldwide			
Gross income	\$52.8	\$50.0	5.6
Volume	\$382.9	\$369.2	3.7
Employees	430	430	0.0
Offices	11	11	0.0

Notes: AA estimated Chuo Senko's gross income from billings provided by the agency. Worldwide returns in tables are all from Japan.
Officers: Shoji Koshizawa, chmn.; Shigeru Otsawa, pres.; Yutaka Otsawa, exec. vp.; Yoshinobu Terada, vp.
Headquarters: Chuo Senko Advertising Co./2-6-1, Giza, Chuo-ku/Tokyo 104, Japan/Phone: 813-3542-0151/Fax: 813-3535-3376

RANK: 36

Clemenger/BBDO

Melbourne
Gross income: \$66.0 million

Organization totals (\$ in millions)			
	1991	1990	% chg
Worldwide			
Gross income	\$66.0	\$67.1	-1.7
Volume	\$391.2	\$399.0	-2.0
Employees	NA	NA	NA
Offices	13	13	0.0

Asian offices
Clemenger BBDO, Melbourne(MN) 308.7
Clemenger Communications, Auckland(MJ) 59.0
HBM Advertising, Auckland(MJ) 23.5
Notes: Clemenger has two parts: a nine-agency Australian operation consolidated under the Melbourne head agency and a two-agency New Zealand component. Clemenger in turn is 46.6% owned by BBDO (see Omnium profile).
Officers: P.G. Clemenger, chmn.; H.J. Mackley, dir.
Headquarters: Clemenger BBDO/474 St. Kilda Rd/Melbourne 3004, Australia/Phone: 613-869-4499/Fax: 613-820-1232

RANK: 20

Dai-ichi Kikaku Co.

Tokyo
Gross income: \$159.9 million

Organization totals (\$ in millions)			
	1991	1990	% chg
Worldwide			
Gross income	\$159.9	\$133.8	19.5
Volume	\$113.1	\$916.2	21.5
Employees	850	824	3.2
Offices	20	11	81.8

U.S. offices
Gross income \$11.1
Volume \$85.1
Employees 3
Offices 1
Notes: Dai-ichi Kikaku Co. has four divisions: the Tokyo agency of the same name; D.I.K. Affiliated Co. Overseas Network; and Domestic Network. D.I.K. Affiliated Co. has nine Tokyo-based agencies involved in non-media and/or agency below-the-line activities. Overseas Network has 10 shops, including three in the U.S. from which it draws equity returns—D.I.K. USA, Kresser Craig D.I.K. and Bloom FCA. Domestic Network covers agencies in nine Japanese cities apart from Tokyo. D.I.K. owns 20% of

Bloom FCA, and 10.69% of FCA Group, Paris, the holding company that owns the rest of Bloom. Both percentages are included in D.I.K.'s composite. D.I.K. has a position on the FCA Group board and has placed agency personnel at Bloom FCA in the U.S., and FCA agencies in Britain and Germany. D.I.K. sold its 2.44% holding in Omnium in 1991, a passive investment not in the prior year.
Officers: N. Sakai, pres.; T. Hirata, exec. vp.; M. Sadaoka, exec. vp.; Y. Hashimoto, a vp.
Headquarters: Dai-ichi Kikaku Co./Hibiya Kohsai Bldg./2-3 Uchisaiwai-cho, 2-chome Chiyoda-ku/Tokyo 100, Japan/Phone: 813-3595-1311/Fax: 813-3595-2963

Kresser Craig D.I.K.			
	1991	1990	% chg
Gross income	\$13.8	\$10.6	30.2
Volume	\$92.2	\$70.6	30.2
Employees	93	85	43.1
Offices	1	1	0.0

Officers: Bob Kresser, chmn.-ceo; Jean Craig, pres.-exec. creative dir.
Headquarters: Kresser Craig D.I.K./2301 Colorado Ave., 2nd Fl./Santa Monica, Calif. 90404/Phone: (310) 315-3000

RANK: 17

Daiko Advertising

Osaka, Japan
Gross income: \$174.3 million

Organization totals (\$ in millions)			
	1991	1990	% chg
Worldwide			
Gross income	\$174.3	\$159.5	9.3
Volume	\$1,378.1	\$1,199.3	6.4
Employees	1,272	1,252	1.6
Offices	21	33	-36.4

Notes: Worldwide returns in tables are from Japan.
Officers: Shiguro Nishio, chmn.; Jun Katayama, pres.-ceo; Seisuke Takada, exec. vp.; Yoshio Maekawa, exec. vp.
Headquarters: Daiko Advertising/3-39, 4-chome, Miyahara, Yodogawa-ku/Osaka 532, Japan/Phone: 816-392-8008/Fax: 816-392-8004

RANK: 12

D'Arcy Masius Benton & Bowles

New York
Gross income: \$534.6 million

Organization totals (\$ in millions)			
	1991	1990	% chg
Worldwide			
Gross income	\$534.6	\$532.5	0.4
Volume	\$4,509.3	\$4,406.7	2.3
Employees	5,926	5,849	1.3
Offices	109	99	10.1

U.S. offices
Gross income \$276.5
Volume \$2,611.4
Employees 2,600
Offices 20
Notes: D'Arcy Masius Benton & Bowles (DMBB), San Antonio, Texas 491.0
DMBB, St. Louis 143.9
DMBB, Chicago 123.2
DMBB, Los Angeles 87.0
DMBB, New York 1.6
DMBB, San Francisco 411.8
DMBB, Bloomfield Hills, Mich. 90.4
DMBB, Sydney(MJ) 14.0
DMBB, Auckland(MJ) 19.7
DMBB, Modern, Hong Kong(MJ) 7.1
DMBB, Tokyo/Singapore, Singapore(MJ) 3.2
DMBB, Manila(MN) 9.8
DMBB, Kuala Lumpur(MN) 4.8
DMBB, Jakarta(MN) 4.8
DMBB, Seoul(MN) 4.8
DMBB, Bangkok(MN) 6.9
DMBB, Taipei(MN) 4.6
DMBB, Tokyo Agency International, Tokyo(MN) 278.6
European offices
DMBB, Frederiksberg(MJ) 20.8
DMBB, Oy, Helsinki(MJ) 14.4
DMBB, New York(MJ) 119.3
DMBB, Stockholm(MJ) 34.7
DMBB, London(MJ) 526.9
DMBB, Vienna(MJ) 9.7
DMBB, Brussels(MJ) 80.8
DMBB, Madrid(MJ) 113.2
DMBB, Lisbon(MJ) 8.1
DMBB, Amsterdam(MJ) 45.8
DMBB, Athens(MJ) 9.1
DMBB, Warsaw(MJ) 0.2
DMBB, Milan(MJ) 158.6
DMBB, Group Germany, Frankfurt(MJ) 341.3
DMBB, Moscow, Moscow(MJ) 1.5
DMBB, Result, Dublin(MN) 4.7
DMBB, Lund & Lammer, Oslo(MJ) 40.1
DMBB, Merkur, Prague(MJ) 0.2
DMBB, Profit W. Budapest(MJ) 1.6
DMBB, Ipsen & Parnis, Copenhagen(MJ) 13.6

Asian offices
DMBB, Frederiksberg(MJ) 20.8
DMBB, Oy, Helsinki(MJ) 14.4
DMBB, New York(MJ) 119.3
DMBB, Stockholm(MJ) 34.7
DMBB, London(MJ) 526.9
DMBB, Vienna(MJ) 9.7
DMBB, Brussels(MJ) 80.8
DMBB, Madrid(MJ) 113.2
DMBB, Lisbon(MJ) 8.1
DMBB, Amsterdam(MJ) 45.8
DMBB, Athens(MJ) 9.1
DMBB, Warsaw(MJ) 0.2
DMBB, Milan(MJ) 158.6
DMBB, Group Germany, Frankfurt(MJ) 341.3
DMBB, Moscow, Moscow(MJ) 1.5
DMBB, Result, Dublin(MN) 4.7
DMBB, Lund & Lammer, Oslo(MJ) 40.1
DMBB, Merkur, Prague(MJ) 0.2
DMBB, Profit W. Budapest(MJ) 1.6
DMBB, Ipsen & Parnis, Copenhagen(MJ) 13.6

International Marketing
& Promotions, London(MJ) 112.4
Penzance DMBB, London(MJ) 11.7
Latin American offices
DMBB, de Venezuela, Caracas(MN) 6.0
DMBB, Buenos Aires(MN) 0.0
DMBB, Mexico City(MJ) 33.7
Canadian offices
DMBB, Canada, Toronto(MJ) 73.8

Notes: D'Arcy Masius Benton & Bowles in 1991 after winning the Quebec account. It sold a shop there in 1990. Totals include fee income of \$19.5 million, down 10.9% from \$21.4 million in 1990.

Officers: Roy Bostock, chmn.-ceo; Clayton Wilhite, pres.-DMBB North America; John C. Ferris, pres.-DMBB Asia, Pacific, Latin America; George J. Simko, pres.-DMBB Europe; Craig D. Brown, exec. vp.-cfo.
Headquarters: D'Arcy Masius Benton & Bowles/1675 Broadway/New York, N.Y. 10019/Phone: (212) 468-3622

Clarion Marketing & Communication			
	1991	1990	% chg
Gross income	\$26.8	\$26.0	3.0
Volume	\$207.1	\$186.2	8.1
Employees	199	190	4.7
Offices	4	4	0.0

Officers: Raymond S. Rizzo, pres.-ceo; Robert D. Abshire, exec. vp.-mg. dir., bus. devel.; Louis P. Boroff, exec. vp.-mg. dir., communications; Ralph N. Sather, exec. vp.-mg. dir., strategic mktg.
Headquarters: Clarion Marketing & Communication/140 Pembroke Rd./Greenwich, Conn. 06831/Phone: (203) 531-3600

Medicus International			
	1991	1990	% chg
Gross income	\$62.6	\$59.1	5.9
Volume	\$468.4	\$464.9	0.8
Employees	601	615	-2.3
Offices	32	34	-5.9

U.S. offices
Gross income \$27.9
Volume \$227.7
Employees 277
Offices 6
Notes: Medicus International, Chicago 37.1
Medicus International International, New York 190.7
Medicus International, Toronto(MJ) 18.6
Asian offices
Medicus International, Tokyo/MJ 21.7
Medicus International, Hong Kong(MJ) 3.4
Medicus International, Sydney(MJ) 7.8

European offices
Medicus International, London(MJ) 33.6
Agency M. E. Group, Paris(MJ) 29.8
Medicus International, Wiesbaden(MJ) 95.7
Medicus International, Barcelona/Madrid(MJ) 5.0
Officers: Lawrence J. Lesser, chmn.-ceo; William Castagnoli, vice chmn.; Glenn DeLamotte, pres.-USA; Nicholas F. Matule, pres.-intl.
Headquarters: Medicus International/1675 Broadway/New York, N.Y. 10019/Phone: (212) 468-3100

Lord, Bentsen & Partners			
	1991	1990	% chg
Gross income	\$19.0	\$20.9	-9.2
Volume	\$151.6	\$169.9	-10.8
Employees	222	233	-4.3
Offices	2	2	0.0

Officers: Richard Lord, chmn.-ceo; Leonard Pearlstein, pres.-ceo.
Headquarters: Lord, Bentsen & Partners/810 Seventh Ave./New York, N.Y. 10019/Phone: (212) 408-2100

Bowes Denton & Partners			
	1991	1990	% chg
Gross income	\$15.1	\$15.1	0.0
Volume	\$97.1	\$97.1	0.0
Employees	93	122	-23.8
Offices	3	3	0.0

Officers: Murray B. Bowes, chmn.-ceo.
Headquarters: Bowes Denton & Partners/4751 Wilshire Blvd./Los Angeles, Calif. 90010/Phone: (213) 930-5100

Notes: Eurocom Group and Rous Seguela Cayez & Goudard in late 1991 merged to form Euro RSCG Group. The new operation has two advertising entities: Euro RSCG Advertising S.A., Paris, and Euro RSCG Advertising Ltd., London. The Paris holdings include the old Eurocom and RSCG networks in Europe, and the RSCG-owned agencies in the U.S. Euro RSCG generally has buyback contracts on shares held by local management, and as a result, equities such as "control" as full ownership. AA, however, includes only the equity portion held by Euro RSCG in organization totals for both years.

Officers: Alain de Pozzilhac, chmn.-ceo; Jacques Seguela, vp.; Jean-Michel Goudard, pres.-ceo, intl.; Alain Cayez, pres.-France.
Headquarters: Euro RSCG/rue de L'Hotel de Ville/92522 Neuilly Cedex, France/Phone: 331-47-38-99-99/Fax: 331-47-45-75-62

Notes: Eurocom Group and Rous Seguela Cayez & Goudard in late 1991 merged to form Euro RSCG Group. The new operation has two advertising entities: Euro RSCG Advertising S.A., Paris, and Euro RSCG Advertising Ltd., London. The Paris holdings include the old Eurocom and RSCG networks in Europe, and the RSCG-owned agencies in the U.S. Euro RSCG generally has buyback contracts on shares held by local management, and as a result, equities such as "control" as full ownership. AA, however, includes only the equity portion held by Euro RSCG in organization totals for both years.

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Asian office
Dentsu, Young & Rubicam, Bangkok(MJ) 25.1
Dentsu, Young & Rubicam, Singapore(MJ) 28.0
Dentsu, Young & Rubicam, Tokyo(MJ) 280.5
Dentsu, Young & Rubicam, Kuala Lumpur(MJ) 25.5
Dentsu, Young & Rubicam, Beijing(MJ) 7.1
Dentsu, Young & Rubicam, Hong Kong(MJ) 54.9
Dentsu, Young & Rubicam, Korea, Seoul(MJ) 9.3
Dentsu, Young & Rubicam, Taipei, Taipei(MJ) 11.0
Dentsu, Young & Rubicam, Manila(MN) 21.0
Dentsu, Young & Rubicam, Richmond(MJ) 33.5
Dentsu, Young & Rubicam, Auckland(MJ) 33.5

Notes: Dentsu was formed out of HDM Worldwide in 1990 when that network broke up after Eurocom, a one-third partner, bought all Eurocom operations from other partners. Y&R and Dentsu, thus left HDM's U.S. and Asia-Oceania shops in the new network owned 50% each by Dentsu and Y&R.
Officers: Shinzo Ueno, chmn.-Tokyo; Gary Burdett, pres.-N.Y.; Alan Rousset, exec. vp.-cfo; Naoki Kobayashi, exec. vp.-dir. worldwide mktg.
Headquarters: Dentsu, Young & Rubicam Partnership/810 Seventh Ave./New York, N.Y. 10019/Phone: (212) 408-2100

Notes: Dentsu, Young & Rubicam Partnership/810 Seventh Ave./New York, N.Y. 10019/Phone: (212) 408-2100
Dentsu Inc./1-11-10 Tsukiji, Chuo-ku/Tokyo 104, Japan/Phone: 813-3544-5599/Fax: 813-3544-2967

Lord, Bentsen & Partners			
	1991	1990	% chg
Gross income	\$19.0	\$20.9	-9.2
Volume	\$151.6	\$169.9	-10.8
Employees	222	233	-4.3
Offices	2	2	0.0

Officers: Richard Lord, chmn.-ceo; Leonard Pearlstein, pres.-ceo.
Headquarters: Lord, Bentsen & Partners/810 Seventh Ave./New York, N.Y. 10019/Phone: (212) 408-2100

Bowes Denton & Partners			
	1991	1990	% chg
Gross income	\$15.1	\$15.1	0.0
Volume	\$97.1	\$97.1	0.0
Employees	93	122	-23.8
Offices	3	3	0.0

Officers: Murray B. Bowes, chmn.-ceo.
Headquarters: Bowes Denton & Partners/4751 Wilshire Blvd./Los Angeles, Calif. 90010/Phone: (213) 930-5100

Notes: Eurocom Group and Rous Seguela Cayez & Goudard in late 1991 merged to form Euro RSCG Group. The new operation has two advertising entities: Euro RSCG Advertising S.A., Paris, and Euro RSCG Advertising Ltd., London. The Paris holdings include the old Eurocom and RSCG networks in Europe, and the RSCG-owned agencies in the U.S. Euro RSCG generally has buyback contracts on shares held by local management, and as a result, equities such as "control" as full ownership. AA, however, includes only the equity portion held by Euro RSCG in organization totals for both years.

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Notes: Eurocom Group and Rous Seguela Cayez & Goudard in late 1991

Headquarters: Messner Vetere Berger Carey
Schmetterer/375 Hudson St./New York, N.Y.
10014/Phone: (212) 886-0200

Tatham/RSCG			
	1991	1990	% chg
Gross income	\$33.4	\$28.7	16.6
Volume	\$324.7	\$278.2	16.7
Employees	268	260	3.1
Offices	1	1	0.0

Officer: Ralph Rydholm, coo

Headquarters: Tatham/RSCG/980 N. Michigan
Ave./Chicago, Ill. 60611/Phone: (312) 437-4400

RANK: 33

FCA Group

Suresnes, France

Gross income: \$79.0 million

Organization totals (\$ in millions)			
	1991	1990	% chg
Worldwide			
Gross income	\$79.0	\$66.1	19.7
Volume	\$615.5	\$510.7	20.5
Employees	1,089	990	10.0
Offices	37	36	2.8
U.S.			
Gross income	\$16.0	\$16.0	0.0
Volume	\$151.3	\$174.1	-13.1
Employees	250	240	4.2
Offices	2	2	0.0

European offices			
	1991	1990	% chg
Birim Reklamcilik, Istanbul(MN)			5.1
CID FCA, Madrid(MN)			87.8
FCA, Duesseldorf(MJ)			36.4
FCA, London(MJ)			53.3
FCA Belgique, Brussels(MJ)			14.0
FCA Caixa Alta, Lisbon(MN)			3.6
FCA France, Paris(MJ)			347.5
FCA/Sabbatini Baldoni Panzeri, Milan(MJ)			63.3
VNH FCA, Amsterdam(MJ)			27.2

Notes: Organization totals include 80% equity of Bloom FCA. Figures for the Paris recruitment agency, Sources, which was sold back to management, are not in either year. Within the group, two pr. units, Chofard & Associates and ID Force, merged to form Public FCA. Its returns are in totals.

Officers: Philippe Calieux, pres-coo; Jean Feldman, exec vp-dir; Marc Bourgeois, exec vp-dir; Jean-Fred Koenig, exec vp-dir

Headquarters: FCA Group/26 Rue Salomon de Rothschild/Suresnes 92150, France/Phone: 331-42-04-25-75

Bloom FCA			
	1991	1990	% chg
U.S.			
Gross income	\$20.0	\$20.0	0.0
Volume	\$189.1	\$174.1	8.6
Employees	250	240	4.2
Offices	2	2	0.0
U.S. offices			
Bloom FCA, Dallas			132.9
Bloom FCA, New York			56.2

Officers: Robert H. Bloom, chmn-pres-coo

Headquarters: Bloom FCA/304 East 45th St./New York, N.Y. 10017/Phone: (212) 370-1313

RANK: 10

Foote, Cone & Belding Communications

Chicago

Gross income: \$616.0 million

Organization totals (\$ in millions)			
	1991	1990	% chg
Worldwide			
Gross income	\$616.0	\$543.4	13.4
Volume	\$4,651.0	\$4,390.1	5.9
Employees	7,872	8,424	-6.6
Offices	174	174	0.0
U.S.			
Gross income	\$299.6	\$287.6	4.2
Volume	\$2,536.3	\$2,539.3	-0.1
Employees	2,529	2,730	-7.4
Offices	10	10	0.0

U.S. offices			
	1991	1990	% chg
Foote, Cone & Belding, Chicago			585.0
Foote, Cone & Belding, San Francisco			438.0
Foote, Cone & Belding, Los Angeles			360.0
FCB/LGK, Philadelphia			115.0
FCB/Labor Katz Partners, New York			552.0

Asian offices			
	1991	1990	% chg
AP Foote, Cone & Belding, Kuala Lumpur(MN)			17.1
Basic Foote, Cone & Belding, Manila(MN)			25.2
Foote, Cone & Belding, Wellington(MJ)			48.9
Foote, Cone & Belding, Hong Kong(MJ)			14.8
Foote, Cone & Belding, Sydney(MJ)			98.0
Prakti & FCB, Bangkok(MN)			28.3
Public FCB Communications, Taipei(MN)			17.4
P.T. Forum Cahaya Buana, Jakarta(MN)			7.5

Latin American offices			
	1991	1990	% chg
FCB de Mexico, Mexico City(MJ)			20.9
FCB/Ecuador, Guayaquil(MJ)			4.4
FCB/El Salvador, San Salvador(MJ)			1.4
FCB/Honduras, Tegucigalpa(MJ)			1.9
FCB/Puma, Bogota(MJ)			11.8
FCB/Siboney, San Jose(MJ)			2.9
FCB/Siboney Publicidade, Sao Paulo(MJ)			48.5
FCB/Siboney/Blanco Uribe, Caracas(MJ)			14.4
Foote, Cone & Belding, Guatemala City(MJ)			4.0
Foote, Cone & Belding, Isla Verde(MJ)			33.9
Foote, Cone & Belding, Santo Domingo(MJ)			4.7
Hernandez/FCB, Port of Spain(MN)			5.1
Lindo, Foote, Cone & Belding, Kingston(MN)			2.3
Pragma/FCB Publicidad, Buenos Aires(MN)			32.5
Publicis/FCB, Panama City(MJ)			5.6

Other offices			
	1991	1990	% chg
FCB/Ronalds Reynolds, Toronto(MJ)			117.9
Lindsay Smithers/FCB, Sandton(MJ)			76.9

Notes: Foote, Cone & Belding Communications consists of the agency of the same name in Chi-

Foreign agencies by gross income

Agency, city, equity	Gross income	% chg	1991 Billings
Argentina Exchange rates: 0.000118 0.000200 austral -41.0%			
FSD/Young & Rubicam, Buenos Aires MJ	7,871	133.6	22,478
J. Walter Thompson Argentina, Buenos Aires NE	7,603	53.5	50,710
Casares Grey, Buenos Aires MJ	5,841	84.5	26,285
Ogilvy & Mather, Buenos Aires MJ	5,702	111.8	39,324
Lautrec/SSA, Buenos Aires NE	5,637	6.3	22,549
Colonnese/Lintas, Buenos Aires MJ	5,369	109.2	35,814
Pragma/FCB Publicidad, Buenos Aires MN	4,878	114.2	32,533
McCann-Erickson, Buenos Aires MJ	4,654	27.7	31,042
David Ratto/BBDO, Buenos Aires MN	4,331	54.2	18,352
Gowland Publicidad, Buenos Aires NE	2,673	43.6	24,051
Leo Burnett Co., Buenos Aires MJ	2,073	53.9	13,821
Capurro & Asociados, Buenos Aires NA	1,795	30.6	7,480
Ruben Maril/DBD Needham, Buenos Aires NE	886	41.4	5,902
Cicero/BSB Publicidad, Buenos Aires NE	784	57.3	3,732
Ayer Vasquez, Buenos Aires MN	5	-39.5	9
Graffiti DMB&B, Buenos Aires MN	0	-15.0	1

Notes: Equity held by parent in Pragma/FCB and David Ratto/BBDO is 20%; Ayer Vasquez 10% and Graffiti DMB&B 5%.

Australia Exchange rates: 0.777800 0.780700 Australian dollar -0.4%			
George Patterson Pty., Sydney MJ	73,113	-6.3	497,792
Clemenger/BBDO, Melbourne MN	49,396	-2.6	308,723
Mattingly & Partners, Richmond MJ	31,631	6.9	210,977
Young & Rubicam Australia, Sydney MJ	27,631	-10.6	191,073
DBD Needham, Sydney MJ	27,514	-5.6	183,518
Chiat/Day/Mojo, Sydney MJ	25,500	-17.2	164,000
Lintas/Australia, Sydney MJ	18,307	9.3	122,108
Saatchi & Saatchi Advertising, Sydney/Melbourne MJ	17,578	-8.3	110,059
Leo Burnett Connaghan & May, Sydney MJ	16,815	-5.7	112,143
McCann-Erickson, Sydney MJ	16,503	-12.8	110,075
Neville Jeffress/Armstrong*, Sydney NA	15,033	-17.8	93,958
J. Walter Thompson Australia, Sydney MJ	14,683	-3.2	97,934
Foote, Cone & Belding, Sydney MJ	14,163	-2.4	97,958
Ogilvy & Mather, Sydney MJ	13,910	-8.5	95,932
DMB&B, Sydney MJ	12,359	-9.2	96,429
Dentsu Australia, Sydney MJ	11,146	5.8	69,661
Grey Australia, Sydney MJ	7,543	12.6	50,312
Bali Partnership, Sydney MJ	6,922	0.8	45,112
Magnus Nankervis & Curl*, Sydney NA	6,720	-9.8	42,017
Charlton*, Sydney NA	6,674	0.1	42,235
John Singleton Advertising*, Sydney NA	5,958	6.0	40,554
Samuelson Talbot & Partners*, Sydney NA	5,779	14.9	30,404
McCarthy Watson & Spencer, Sydney NA	5,056	6.2	31,579
Kobs & Draft Bond Direct, Melbourne/Sydney MJ	3,990	2.7	26,600
Luscombe & Partners, Port Melbourne MN	3,970	1.8	24,560
John Bevis Pty., Sydney NA	3,850	37.0	23,435
Omon Ltd., Sydney NA	3,313	-31.0	20,332
Pemberton Australia*, Sydney NA	3,259	-8.3	20,378
Hertz Walpole*, Sydney NA	3,033	-2.1	18,963
Harris Robinson & Associates, Sydney NE	2,986	19.6	18,901
Moffat Sharp*, Melbourne NA	2,808	5.5	17,501
Foster Hunn Loverd*, Sydney NA	2,800	24.5	17,501
Peter Doyle Advertising, Sydney MJ	1,841	7.0	7,837
Bozell Rydgo, Sydney MJ	765	-49.6	5,451
Hakuhodo Australia, Sydney MJ	306	NA	1,736

Notes: * AA estimates of gross income and billings. Young & Rubicam figures include Wunderman, Cato Johnson, Sadler & Hennessy and Burson Marsteller. George Patterson Pty. figures include The Campaign Palace and Marketforce. Chiat/Day/Mojo figures include Sydney, Melbourne, Brisbane and Perth offices. Peter Doyle part of Medicus Intercom.

Austria Exchange rates: 0.087692 0.087200 schilling 0.6%			
GGK Vienna/Salzburg, Vienna/Salzburg MN	12,101	13.9	80,677
Euro RSCG Austria Group, Vienna MJ	11,418	8.2	75,539
Demner & Mericek, Vienna NA	11,382	10.6	75,889
Young & Rubicam, Vienna MJ	10,304	13.9	68,730
Werbeagentur Wirz, Vienna MN	10,216	19.5	68,145
Saatchi & Saatchi Advertising, Vienna MJ	9,734	-0.3	64,734
Lintas/Wien, Vienna MJ	9,699	6.8	64,689
Ogilvy & Mather, Vienna MJ	8,910	3.7	61,446
Dr. Puttner & BSB, Vienna MJ	7,059	30.6	47,082
Haupt-Stummer/J. Walter Thompson, Vienna MJ	6,539	13.4	43,592
Team/BBDO, Vienna MJ	6,516	11.2	43,302
McCann-Erickson, Vienna MJ	5,761	11.4	38,426
DBD Needham Heye & Partner, Vienna MJ	4,955	32.4	33,047
MMS Werbeagentur, Linz NA	3,981	-1.2	27,009
Grey Austria, Vienna MJ	3,771	-26.6	54,483
Haslinger, Keck Werbeagentur, Linz NE	3,560	19.4	23,677
Bozell Publicitas, Vienna NE	3,025	2.8	20,169
Publicis FCB, Vienna MJ	2,920	-1.7	27,626
DMB&B, Vienna MJ	1,215	-34.5	9,672
Conquest Europe Austria, Vienna MJ	225	-12.8	1,775

Notes: Lintas Wien includes data for P.C.N. Salzburg. Young & Rubicam includes Wunderman.

Belgium Exchange rates: 0.029558 0.029370 Belgian franc 0.6%			
McCann-Erickson Belgium, Brussels MJ	18,945	-4.2	126,363
Garbanski Euro RSCG, Brussels MJ	16,762	85.3	111,831
HHO Ogilvy & Mather, Brussels MJ	14,245	-9.3	98,242
DMB&B, Brussels MJ	12,109	-15.6	80,770
Lintas/Belgium, Brussels MJ	11,457	3.4	76,419
Low Troost, Brussels MJ	10,264	-0.2	68,427
Young & Rubicam Belgium, Brussels MJ	9,641	-0.6	64,311
Publicis FCB, Brussels MJ	9,155	2.7	77,029

Gross income and billings are U.S. \$ in thousands

Compiled by: Ise Cernak

Foreign agencies (continued)

Agency, city, equity	Gross income	% chg	1991 Billings
Belgium Exchange rates: 0.029558 0.029370			
DBD Needham, Brussels MJ	9,086	17.9	60,601
Leo Burnett-Belgium, Brussels MJ	8,869	11.3	59,156
Grey, Brussels MJ	8,014	-7.2	55,773
VVL/BBDO, Brussels MJ	6,937	9.7	46,271
J. Walter Thompson Co., Brussels MJ	6,790	-16.0	45,280
TBWA, Brussels MJ	5,563	15.5	37,083
Saatchi & Saatchi Advertising, Brussels MJ	5,439	42.0	36,268
BSB Brussels, Brussels MJ	5,246	-40.8	34,990
Eurocom International Brussels, Brussels MJ	3,337	-13.7	22,258
Bozell Wymans Bogaerts, Brussels MJ	3,222	26.1	32,809
LVH, Brussels MJ	3,163	6.7	23,084
BBDO Belgium, Brussels MJ	3,118	20.1	20,798
Moors Bronselaer, Brussels MJ	2,877	16.9	19,190
FCA Belgique, Brussels MJ	2,099	17.1	13,951
Mirror/GK Brussels, Brussels NE	1,817	1.6	12,119
KPR, Brussels MJ	1,767	7.2	11,789
Conquest Europe Belgium, Brussels MJ	1,735	79.4	12,111
Lenders DeRoost, Brussels MJ	1,478	-13.2	9,858
Moraal & Partners, Antwerp MJ	1,375	18.5	9,173
Dialogic, Brussels NA	948	-2.1	6,323
Quattro, Brussels MJ	900	NA	6,200

Notes: Young & Rubicam Belgium includes Wunderman, Cato Johnson and Burson Marsteller. Lenders DeRoost part of Euro RSCG Group. Lintas Belgium includes Axa, Missa Hall, Heering & I.M.E. McCann-Erickson Belgium includes Universal Media, Moraal & Partners and Moors Bronselaer part of BBDO Worldwide. Quattro majority-owned by CDP Europe. LVH now part of Publicis FCB.

Brazil Exchange rates: 0.003758 0.015000 new cruzado -74.9%			
Lintas/Brasil Comunicacoes, Sao Paulo MJ	72,572	-14.6	484,053
Dualilbi, Petit, Zaragoza Propaganda, Sao Paulo NA	39,459	54.7	155,581
McCann-Erickson Brazil, Sao Paulo MJ	32,877	24.2	219,290
ALMAP/BBDO Comunicacoes, Sao Paulo MN	27,128	4.6	92,398
Salles/Inter-Americana de Publicidade, Sao Paulo NA	24,071	14.8	119,285
W/Brasil Publicidade, Sao Paulo NA	23,041	40.7	88,382
Standard, Ogilvy & Mather, Sao Paulo MJ	20,266	-32.6	139,762
Norton Publicidade, Sao Paulo NE	12,439	-36.2	69,899
J. Walter Thompson Publicidade, Sao Paulo MJ	11,902	-2.8	46,591
DM 9 Publicidade, Sao Paulo NA	11,660	201.3	55,484
Leo Burnett Publicidade, Sao Paulo MJ	11,017	65.4	73,452
Young & Rubicam do Brasil, Sao Paulo MJ	10,863	-46.3	72,457
Better Comunicacao, Sao Paulo NE	9,216	-11.5	46,077
FCB/Siboney Publicidade, Sao Paulo MJ	7,266	28.8	48,464
Denison/BSB, Sao Paulo NE	4,626	-4.2	18,501
CBBA Propaganda, Sao Paulo MJ	3,534	-17.6	20,073
Caio Domingues & Associados, Rio de Janeiro NA	2,648	-28.1	9,933
Futura/SMS, Sao Paulo MJ	2,196	1.3	14,643
Z&G Comunicacao, Sao Paulo NE	1,920	NA	12,806

Notes: In 1991 Lintas/Brasil acquired MPM Propaganda, Sao Paulo. MPM data for both years is included in Lintas totals—gross income of \$59,082,000 for 1991 and \$63,743,000 for 1990. Young & Rubicam do Brasil includes Wunderman and Burson Marsteller. McCann-Erickson Brazil includes Interpublic Brazil. Better Comunicacao affiliated with Saatchi & Saatchi Advertising. Norton Publicidade affiliated with Bozell. CBBA Propaganda part of J. Walter Thompson Co. Z&G Comunicacao affiliated with Grey.

Britain Exchange rates: 1.777017 1.768800 pound 0.5%			
Saatchi & Saatchi Advertising, London MJ	178,814	-4.6	1,187,500
J. Walter Thompson Co., London MJ	108,398	10.4	721,469

Foreign agencies (continued)

Agency, city, equity	Gross income	% chg	1991 Billings
Exchange rates: 1.77702 1.768800			
Britain			
Graham Poulter Partnership*, London NA	9,887	-15.3	76,056
Golley Slater*, London NA	8,709	-10.1	66,994
DFSD Bozell, London MJ	8,422	-4.8	56,176
Roose & Partners, London NE	8,077	7.9	53,844
Simons Palmer Denton Clemmow & Johnson*, London NA	7,392	60.7	56,865
Conran Group, London MJ	7,366	21.7	49,129
C/D/M Inc., London MJ	7,300	108.6	47,000
Brunning, London MN	7,260	-67.5	47,800
Burkitt Weinreich Bryant, London NA	6,397	-2.3	49,756
Moxon Dolphin & Kerby*, London NA	6,292	-40.4	48,406
Kelly Weedon Shute*, London NA	6,237	61.5	47,979
Miller & Leves WAHT, London MJ	6,077	7.4	40,516
Leagas Sharon Davis Chick*, London NA	5,845	13.0	44,959
Kobs & Draft, London MJ	5,325	241.3	35,500
Smee's Group, London NA	5,292	5.0	27,000
Bowden Dible Hayes & Partners, Manchester MJ	5,153	-11.7	30,920
Howell Henry Chaldecott Lury, London NA	4,658	2.0	57,948
FCA, London MJ	4,443	NA	53,311
Travis Dale & Partners, London MJ	4,265	4.8	28,432
Harari/Page Ltd., London NA	4,158	201.4	31,986
Griffin Bacal, London MJ	2,652	44.7	18,700
Paling Ellis KPR, London MJ	2,383	-17.3	15,892
Hakuhodo UK, London MJ	1,555	43.2	9,104
Doremus & Co., London MJ	1,386	1.4	9,238

Notes: * AA estimated gross income. Billings figures were published in Campaign magazine's Top 300 agencies chart, Feb. 28. KHRB majority-owned by Saatchi & Saatchi Advertising. SPCTD-Lintas includes CMLintas Int'l. McCann-Erickson U.K. includes Turnaround, Harrison, Direct, Advertising Ltd., Epic U.K. and Sales Desk. Yellowhammer figures included in DMB&B totals. Gross income for 1991 for Yellowhammer was \$5,402,000. Also, Medicus Intercon's ADA Group included in DMB&B's totals. Gross income for 1991 for ADA's four offices is \$6,660,260. Option One and Bowden Dible Hayes & Partners majority-owned by Gold Greenlees Trot. Miller & Leves WAHT majority-owned by BDDP. Paris, Travis Dale & Partners part of CDP Europe. FCO Ltd. included in Euro RSCG U.K. totals. FCO's gross income for 1991 is \$5,616,000. Lansdowne part of Conquest Europe. Young & Rubicam U.K. includes Wunderman, Cato Johnson, Burson-Marsteller, Sudler & Hennessy and Landor. KLP Group and Conran Group part of Euro RSCG U.K. BSB Dorland includes Asset Marketing, Bungey Medical, SBS, Ethical Communications, DBC, Tillbrooks, Euro-Media Express, Decision Shop and Mann Hughes Gerrish.

Canada Exchange rates: 0.872225 0.856300 Canadian dollar 1.9%			
Young & Rubicam, Toronto MJ	32,395	18.1	375,994
McCann-Erickson Canada, Toronto MJ	30,296	3.2	202,074
Cossette Communication-Marketing, Quebec City NA	29,525	2.2	196,832
MacLaren-Lintas, Toronto MJ	27,528	-1.8	183,614
McKim Advertising, Toronto MN	24,946	-2.9	165,723
Ogilvy & Mather, Toronto MJ	23,192	-1.9	159,948
J. Walter Thompson Co., Toronto MJ	21,253	2.5	141,755
Grey Canada, Toronto MJ	19,067	-1.0	127,176
FCB/Ronalds Reynolds, Toronto MJ	17,678	-5.0	117,857
Leo Burnett Co., Toronto MJ	17,344	12.6	115,633
Baker Lovick/BDDO, Toronto MN	17,012	-0.5	125,650
BCP Group*, Montreal NA	15,046	12.6	100,306
BSB Canada, Toronto MJ	12,939	-2.4	101,614
Palmer Jarvis Advertising, Vancouver NA	11,533	2.6	72,772
DMB&B Canada, Toronto MJ	10,666	19.5	73,811
Saatchi & Saatchi Advertising, Toronto MJ	9,907	-13.4	79,254
C/D/M Inc., Toronto MJ	9,000	26.8	58,000
Carder Gray DDB Needham, Toronto MJ	8,557	-8.6	57,072
Prism Communications, Montreal NA	5,321	24.3	31,400
Bozell Palmer Bonner, Toronto MJ	5,318	-11.0	35,471
Ambrose Carr Linton Kelly, Toronto NA	5,263	5.8	35,104
SMS/Canada, Toronto/Vancouver MJ	5,254	-51.5	35,024
Miller Myers Bruce DallasCosta Alliance, Toronto MJ	4,057	10.4	18,544
Deacon Day Advertising, Toronto MN	3,925	-23.6	26,167
Anderson Advertising, Toronto NA	3,314	21.0	21,806
Allard/SNW et Associes, Montreal NA	2,966	40.4	19,625
Medicus Intercon, Toronto NA	2,380	117.7	18,571
Enterprise Advertising, Toronto MJ	2,222	-15.2	14,823
Paul, Phelan & Perry, Toronto NA	1,396	1.9	10,467
McNally & Sutherland, Willowdale, Ont. NA	1,373	0.2	9,158
Francis, Williams & Johnson, Calgary NE	1,365	21.1	9,071
Bleau, Duperrey, Giguere & Associes, Quebec NA	423	-4.9	2,820
Stringer Veroni Ketchum, Toronto MN	410	740.4	2,733
Kobs & Draft, Toronto MJ	330	0.0	2,200
Griffin Bacal Canada, Toronto MJ	206	NA	2,800
Publicite Pinnacle, Montreal NA	201	2.3	1,343

Notes: * AA estimated gross income. Young & Rubicam includes Wunderman, Cato Johnson, Burson-Marsteller and Sudler & Hennessy. McCann-Erickson Canada includes Harrold & Mirlin and Lovick Canada. Harrold & Mirlin's gross income for 1991 is \$5,386,000. BDDO Worldwide acquired in January 1992 from N.W. Ayer 45% of McKim Advertising. Toronto. McKim will be merged with Baker Lovick/BDDO and the new name will be Baker Lovick/BDDO. Deacon Day Advertising part of the Lowe Group. Enterprise Advertising part of J. Walter Thompson Co. Leo Burnett Co. totals include figures for RTA Advertising, Montreal.

Chile Exchange rates: 0.002938 0.003423 peso -14.2%			
BDDO de Chile, Santiago MN	4,083	2.7	27,233
McCann-Erickson Chile, Santiago MJ	4,074	11.6	27,174
J. Walter Thompson Chilena, Santiago MJ	3,895	4.1	26,883
Azocar, Morrison, Walker, Santiago MN	2,828	-1.0	18,855
Lintas-Chile, Santiago MJ	1,947	1.5	12,284
Leo Burnett-Chile, Santiago MJ	1,884	29.8	12,563
Northcote/Ogilvy & Mather, Santiago MN	1,851	9.2	12,765
Grey Chile, Santiago MN	1,519	12.0	10,131
Israel & De Bianchi, Santiago NE	1,404	4.3	9,383
Unites Chile, Santiago NE	1,284	3.7	8,564
Prolam, Santiago NA	1,199	32.1	8,000
Porta Publicidad, Santiago NA	976	-11.9	6,279

Gross income and billings are U.S. \$ in thousands

Foreign agencies (continued)

Agency, city, equity	Gross income	% chg	1991 Billings
Chile Exchange rates: 0.002938 0.003423 peso -14.2%			
ABM-Zegers, Santiago MN	959	1.0	8,397
Young & Rubicam de Chile, Santiago MJ	815	54.7	5,196
Prologo/Bozell, Santiago NE	408	18.4	2,724
BSB Chile, Santiago NE	250	NA	1,665

Notes: Unites Chile affiliated with DDB Needham, Israel & De Bianchi affiliated with Saatchi & Saatchi Advertising. Azocar, Morrison, Walker 20% owned by J. Walter Thompson Co. BDDO de Chile includes Publiart.

China Exchange rates: 0.188521 0.191490 renmibi -1.6%			
Dentsu, Young & Rubicam China, Beijing MJ	1,068	107.2	7,121
McCann-Erickson China, Beijing MJ	697	33.3	1,649
BSB/S&S Advertising, Guangzhou/Beijing JV	159	NA	1,594

Colombia Exchange rates: 0.001774 0.001940 peso -8.6%			
McCann-Erickson Colombia, Bogota MJ	5,015	46.6	33,450
Propaganda Sancho, Bogota NE	2,932	-11.1	11,621
Atenas/BDDO, Bogota NE	2,870	82.9	11,351
Leo Burnett-Colombia, Bogota MJ	2,737	37.4	11,249
Atlas Publicidad, Bogota NE	2,173	3.3	11,488
FCB/Puma, Bogota MJ	2,011	16.2	11,847
Aser Publicidad/Y&R, Bogota MN	1,951	NA	15,851
Centrum Ogilvy & Mather, Bogota MN	1,480	34.5	1,863
BSB de Colombia, Bogota NE	1,222	15.2	3,146
Esfera Publicidad, Bogota NE	1,135	6.1	7,573
Jaime Uribe & Asociados, Medellin NA	887	NA	5,322
Lintas-Colombia, Bogota MN	803	58.2	5,356
J. Sanchez Asociados, Bogota NE	733	4.5	3,757

Notes: McCann-Erickson Colombia includes Harrison Publicidad Colombia. Propaganda Sancho affiliated with Saatchi & Saatchi Advertising. Atlas Publicidad affiliated with J. Walter Thompson Co. J. Sanchez Asociados affiliated with Bozell. Esfera Publicidad affiliated with Grey.

Costa Rica Exchange rates: 0.007800 0.009756 colon -20.0%			
Garnier BDDO, San Jose NE	3,139	16.1	20,928
McCann-Erickson Centroamericana, San Jose MJ	1,141	2.7	7,610
FCB/Siboney, San Jose MJ	429	-19.5	2,860
Publicidad Comercial/Leo Burnett, San Jose MJ	397	10.3	2,649
APCU de Costa Rica, San Jose NE	353	-7.7	2,354
GM/SSA, San Jose NE	243	NA	1,170

Czechoslovakia Exchange rates: 0.036500 0.036500 koruna 0.0%			
Y&R Czechoslovakia, Prague NA	732	NA	4,882
Mark/BDDO, Prague NE	445	NA	2,251
BSB/S&S Creative Comm., Prague JV	200	NA	1,300
Grey, Prague MJ	175	NA	1,167
GGK Prague/Bratislava, Prague/Bratislava MN	82	NA	548
DDB Needham, Prague MJ	78	NA	521
DMB&B/Merkur, Prague MJ	28	NA	187
Eurocom Advertising, Prague MJ	27	NA	183
McCann-Erickson Czechoslovakia, Prague MJ	0	NA	0

Notes: Leo Burnett Prague C&FR figures included in totals for Michael Conrad & Leo Burnett, Frankfurt.

Denmark Exchange rates: 0.157758 0.160300 kroner -1.6%			
Grey Communications Group, Copenhagen MJ	22,064	9.2	147,166
BSB Gruppen, Copenhagen MJ	16,659	19.3	127,747
Lintas/GR-Denmark, Copenhagen MJ	16,317	13.1	108,836
Scan-Ad Reklamabureau, Aarhus NA	11,975	2.6	79,875
Young & Rubicam Copenhagen, Copenhagen MJ	9,846	-28.2	65,917
Team/BDDO, Copenhagen MJ	9,778	0.5	60,446
Euro RSCG Denmark, Copenhagen MJ	7,013	-7.1	47,717
NP/3 Advertising, Aarhus NA	6,435	-2.5	42,920
Bergsøe, Copenhagen NE	6,300	16.7	48,200
Ogilvy & Mather, Copenhagen MJ	5,458	7.6	42,438
Lyre & Valbo Reklamabureau, Copenhagen NA	4,985	4.0	33,192
Leo Burnett-Denmark, Copenhagen MJ	3,893	3.4	25,954
DDB Needham, Copenhagen MJ	3,303	5.9	22,028
Saatchi & Saatchi Advertising, Copenhagen MJ	3,085	14.7	15,657
J. Walter Thompson Co., Copenhagen MJ	2,900	32.8	20,000
Berg & Schjaerovren Kommunikation, Copenhagen NA	2,840	NA	20,509
McCann-Erickson, Copenhagen MJ	2,739	5.2	18,269
Creafarm, Frederiksberg NE	2,382	-8.3	16,091
D'Arcy Masius Benton & Bowles, Frederiksberg MJ	2,051	-10.7	20,824
Publicis FCB/MSW, Copenhagen MJ	1,990	-12.1	3,697
Dyppel Advertising, Copenhagen NA	1,771	-12.2	2,847
DMW/ipsen & Parne, Copenhagen MJ	1,420	-19.5	3,567

Notes: Young & Rubicam Copenhagen includes Wunderman, Cato Johnson and Burson-Marsteller. BSB Gruppen includes Ted Bates, Norgard Mikkelsen, Plan Design and Leise. Creafarm affiliated with Bozell.

Dominican Republic Exchange rates: 0.080000 0.089290 peso -10.4%			
Young & Rubicam Damaris, Santo Domingo MJ	1,868	48.6	2,460
McCann-Erickson Dominican, Santo Domingo MJ	941	29.6	6,276
Foote, Cone & Belding, Santo Domingo MJ	708	59.8	4,720
Leo Burnett Co., Santo Domingo MJ	570	24.4	3,798
Cumbre/SSA, Santo Domingo NE	552	354.2	2,168
Thompson AIFE-MFP, Santo Domingo MN	443	48.4	2,956

Ecuador Exchange rates: 0.001026 0.001380 sucre -21.7%			
Norlop Thompson Asociados, Guayaquil MN	2,376	7.3	5,851
Veritas/Ogilvy & Mather, Guayaquil NE	2,348	20.2	6,194
McCann-Erickson, Guayaquil MJ	1,954	31.4	3,033
FCB/Ecuador, Guayaquil MJ	662	10.6	4,414
Publicitas/SSA, Guayaquil NE	513	88.1	2,850
VIP/BSB Publicidad, Quito NE	272	19.8	1,539

Egypt Exchange rates: 0.316808 0.374400 Egyptian pound -11.4%			
Americana Advertising Agency, Cairo NA	950	1.5	7,096
TBN, Cairo NE	539	29.6	3,580

Gross income and billings are U.S. \$ in thousands

cago and 49% of Publicis-FCB Communications B.V., Paris, another World's Top 50 organization (See Publicis-FCB profile.) The Chicago agency includes FCB's U.S. South American, Australasia and Asian units. FCB in 1991 sold Albert Frank-Guenther Law, New York/San Francisco. Its numbers appear in neither year.

Officers: Bruce Mason, chmn-cps, Jack Balousek, pres-coo
Headquarters: Foote, Cone & Belding Communications/101 E. Erie St./Chicago, Ill. 60611/Phone (312) 751-7000

FCB Direct U.S.			
U.S.	1991	1990	% chg
Gross income	\$30.1	\$28.5	5.8
Volume	\$201.0	\$190.0	5.8
Employees	NA	NA	NA
Offices	5	5	0.0

Officer: Gregory W. Blaine, exec vp
Headquarters: FCB Direct U.S./101 E. Erie St./Chicago, Ill. 60611/Phone (312) 751-7000

IMPACT			
U.S.	1991	1990	% chg
Gross income	\$11.7	\$10.6	9.8
Volume	\$77.9	\$69.7	11.7
Employees	NA	NA	NA
Offices	4	4	0.0

Officer: Joseph P. Flanagan, pres
Headquarters: IMPACT/101 E. Erie St./Chicago, Ill. 60611/Phone (312) 751-3500

VICOM/FCB			
U.S.	1991	1990	% chg
Gross income	\$17.4	\$14.3	21.4
Volume	\$148.4	\$136.0	9.1
Employees	134	127	5.5
Offices	3	3	0.0

U.S. offices
VICOM/FCB, San Francisco 50.4
VICOM/FCB, Philadelphia 17.3
VICOM/FCB, New York 48.0

Officer: D. John Loden, pres-coo
Headquarters: VICOM/FCB/One Lombard St./San Francisco, Calif. 94111/Phone (415) 391-8700

Wahlstrom & Co.			
U.S.	1991	1990	% chg
Gross income	\$11.6	\$12.5	-7.2
Volume	\$77.0	\$83.0	-7.2
Employees	145	150	-3.3
Offices	4	4	0.0

Officer: Francis J. Barton, pres
Headquarters: Wahlstrom & Co./1290 E. Main St./Stamford, Conn. 06902/Phone (203) 348-7347

RANK: 39			
GGK International			
Zurich			
Gross income: \$61.3 million			

Organization totals (\$ in millions)			
Worldwide	1991	1990	% chg
Gross income	\$61.3	\$61.9	-1.0
Volume	\$398.2	\$377.5	5.5
Employees	537	495	8.5
Offices	18	17	5.9
European offices			
GGK Amsterdam, Amsterdam(MJ)			32.8
GGK, Basel Geneva/Zurich(MJ)			113.1
GGK Budapest, Budapest(MN)			7.0
GGK Emotion, Paris(MJ)			74.1
GGK Frankfurt, Frankfurt(MJ)			51.9
GGK London, London(MJ)			184.1
GGK Madrid, Madrid(MJ)			10.4
GGK Milan, Milan(MJ)			14.0
GGK Prague/Bratislava, Prague/Bratislava(MN)			0.5
GGK Vienna/Saltburg, Vienna/Saltburg(MN)			80.7

Notes: Returns for GGT PLC also include those of RMC, a U.K. audio-visual shop.
Officers: Michael Greenlees, joint chmn, Michael Gold, joint chmn.
Headquarters: Gold Greenlees Trot/82 Dean St/London W1V 5AB, England/Phone: 4471-437-0434/Fax: 4471-494-0118.

Babbitt & Reiman Advertising			
U.S.	1991	1990	% chg
Gross income	\$5.6	\$6.1	-8.0
Volume	\$46.4	\$50.4	-7.9
Employees	70	62	12.9
Offices	1	1	0.0

Officers: Joey Reiman, chmn; Michael Gaffney, pres.
Headquarters: Babbitt & Reiman Advertising/3060 Peachtree Rd. NW, Penthouse/Atlanta, Ga 30305/Phone: (404) 365-0550.

GSD&M			
U.S.	1991	1990	% chg
Gross income	\$20.1	\$20.0	0.4
Volume	\$149.5	\$149.0	0.4
Employees	179	210	-14.8
Offices	1	1	0.0

Officers: Steve Gurasich, chmn; Roy Spence, pres; Tim McClure, exec vp-creative dir.
Headquarters: GSD&M/1250 Capital of Texas Hwy South, Suite 400/Austin, Texas 78746/Phone: (512) 327-8810.

Martin-Williams Advertising			
U.S.	1991	1990	% chg
Gross income	\$14.6	\$13.3	9.8
Volume	\$119.0	\$108.0	10.2
Employees	157	144	9.0
Offices	2	2	0.0

U.S. offices: Billings
 Martin-Williams Advertising, St. Louis 3.1
 Martin-Williams Advertising, Minneapolis 115.9
Officers: David D. Floren, chmn; Tom F. Weyl, pres.
Headquarters: Martin-Williams Advertising/10 S. Fifth St./Minneapolis, Minn. 55402/Phone: (612) 340-0800.

RANK: 8

Grey Advertising

New York
 Gross income: \$659.3 million

Organization totals (\$ in millions)			
Worldwide	1991	1990	% chg
Gross income	\$659.3	\$617.0	6.9
Volume	\$4,437.4	\$4,135.2	7.3
Employees	6,597	6,718	-1.8
Offices	183	224	-18.3
U.S.	1991	1990	% chg
Gross income	\$292.9	\$276.8	5.8
Volume	\$1,953.5	\$1,846.5	5.8
Employees	2,154	2,148	0.3
Offices	4	4	0.0

U.S. offices: Billings
 Grey Advertising, Los Angeles 190.5
 Grey Advertising, San Francisco 49.0
 Grey Advertising, New York 1,560.7
Asian offices: Billings
 Aspac & Grey, Manila(MN) 6.1
 Binamark Indonesia, Jakarta(NE) 6.3
 Blazon Advertising, Karachi(NE) 3.0
 Geoson Advertising, Seoul(NE) 36.5
 Grey, Singapore(MJ) 16.9
 Grey Advertising NZ, Auckland(MJ) 5.9
 Grey Australia, Sydney(MJ) 50.3
 Grey Hong Kong, Hong Kong(MJ) 43.5
 Grey Malaysia, Kuala Lumpur(MN) 8.1
 Grey Thailand, Bangkok(MN) 7.2
 Grey-Dalio, Tokyo(MJ) 72.3
 Hwa Wei & Grey, Taipei(MN) 33.3
 Trikaya Grey, Bombay(MN) 12.0

European offices: Billings
 AS & Grey, Helsinki(MN) 123.6
 Cenajans Grey, Istanbul(MN) 52.8
 Grey, Warsaw(MJ) 2.0
 Grey, Paris(MJ) 254.8
 Grey, Brussels(MJ) 55.8
 Grey, Budapest(JV) 1.9
 Grey, Geneva Zurich(MN) 36.1
 Grey, Amsterdam(MJ) 75.9
 Grey, Athens(MJ) 1.2
 Grey, Prague(MJ) 1.9
 Grey Austria, Vienna(MJ) 54.5
 Grey Communications, Stockholm(MJ) 94.1
 Grey Communications Group, London(MJ) 625.9
 Grey Communications Group, Copenhagen(MJ) 147.2
 Grey Espana, Madrid/Barcelona(MJ) 107.2
 Grey Gruppe Deutschland, Duesseldorf(MJ) 374.3
 Jensen Grey, Oslo(MN) 14.2
 Milano & Grey, Milan(MJ) 222.5
 Movex Publicidade, Lisbon(NE) 8.7
Latin American offices: Billings
 Casares Grey, Buenos Aires(MJ) 26.3
 Esfera Publicidad, Bogota(NE) 7.6
 Fischer Grey, Caracas(MJ) 23.4
 Grey Chile, Santiago(MN) 10.1
 Grey Mexico, Mexico City(MJ) 25.2
 Grey Peru, Lima(MN) 9.8
 Grey Uruguay, Montevideo(MN) 3.3
 Grimax Advertising, Kingston(NE) 1.8
 Smith Oslay Jordan & Edgill, St. Michaels(NE) 6.5
 West Indies & Grey, San Juan(MJ) 42.8
 Z&G Comunicacao, Sao Paulo(NE) 12.8

Other offices: Billings
 Grey Canada, Toronto(MJ) 127.2
 Grey Holdings, Johannesburg(MN) 74.2
 Warshawsky Freilich Dover, Tel Aviv(NE) 12.1

Notes: Grey Advertising figures include GCI, its pr unit with fees of \$28.5 million in 1991, up 29.5%. Grey's totals omit returns from Levine, Huntley, Vick & Beaver for both years. Fully owned LHV&B folded in 1991.
Officers: Edward H. Meyer, chmn-pres; Robert L. Berenson, exec vp-admin; Richard M. Karp, exec vp, co-dir, creative; Stephen A. Novick, exec vp, co-dir, creative.
Headquarters: Grey Advertising/777 Third Ave./New York, N.Y. 10017/Phone: (212) 546-2000.

Foreign agencies (continued)

Agency, city, equity	Gross income	% chg	1991 Billings
Egypt Exchange rates: 0.316808 0.374400 Egyptian pound -15.4%			
Impact/BBDO Cairo, Cairo MN	194	52.8	1,292
AMA, Leo Burnett, Cairo NE	182	-5.7	1,210
Saatchi & Saatchi Advertising, Cairo MJ	150	-16.7	1,000

Notes: TMI affiliated with J. Walter Thompson Co.

Finland Exchange rates: 0.252208 0.236800 markka 6.5%			
AS & Grey, Helsinki MN	18,537	-4.1	123,644
Oy Liikemainto-McCann, Helsinki MJ	10,768	-17.0	71,823
Taucher, Young & Rubicam, Helsinki MN	10,088	-25.2	76,208
BSB Finnad, Helsinki MJ	8,892	-32.2	59,307
Markkinointi Viherjuuri Oy*, Helsinki NA	7,642	-12.1	38,210
Lintas Oy, Helsinki MJ	7,001	2.1	46,699
Oy Dagmar*, Helsinki NA	6,583	-0.7	32,613
Erva-Latvala Oy*, Helsinki NA	5,472	-14.8	27,360
Turkama & Kumppanit Oy*, Helsinki NA	3,960	-15.0	19,798
Markkinointi Topiforma Oy*, Helsinki NA	3,934	13.2	19,672
Akt/BBDO Business Communications, Helsinki NE	3,846	-20.7	11,430
MK-mainos Oy*, Helsinki NA	3,745	5.7	18,725
Juniormainos Oy*, Helsinki NA	3,414	10.5	17,072
Interplan, Helsinki NE	3,279	-9.5	21,869
Creator Oy*, Helsinki NA	2,655	30.4	13,276
J. Walter Thompson-Finland Oy, Helsinki MN	2,648	-6.8	17,663
Mainostoimisto Varis Poteri Veist*, Helsinki NA	2,648	-12.6	13,241
Kaupparemainos-Bozell, Helsinki MJ	2,580	-20.1	10,550
Euro RSCG Finland, Helsinki MJ	2,573	31.6	17,159
Brand Sellers DDB Needham, Helsinki MN	2,522	NA	16,822
Oy Adsek*, Tampere NA	2,497	-23.4	12,484
Mainostoimisto Konspekti Oy*, Helsinki NA	2,396	-8.0	11,980
Ogilvy & Mather, Helsinki MJ	2,306	-10.1	20,542
D'Arcy Masius Benton & Bowles Oy, Helsinki MJ	2,156	6.6	14,371
Mainostoimisto U&M Oy*, Helsinki NA	2,144	-7.6	10,719
Oy Valotorni*, Helsinki NA	2,107	-20.4	10,533
Datum Oy*, Helsinki NA	2,068	-11.8	10,341
USP Helsinki Oy*, Helsinki NA	1,871	-15.4	9,357
Oy Avant/BBDO, Helsinki NE	1,856	13.0	6,154
Turun Taucher Oy*, Turku NA	1,841	-11.9	9,206
Mainoskentta Oy*, Tampere NA	1,745	-27.9	8,726
USP Turku Oy*, Turku NA	1,589	-4.1	7,945
Tampereen Taucher Oy*, Tampere NA	1,324	-5.0	6,620
V.S.O.P. Oy*, Tampere NA	1,307	-10.9	6,535
Adax-Exact Mainos Oy*, Turku NA	1,307	-4.6	6,533
PVK Alliance, Helsinki NE	946	-50.1	6,305
Kobs & Draft Finnad, Helsinki MJ	330	-60.7	2,200

Notes: * AA estimated billing; figures, Lintas Oy includes Make Direct and Impulse; Oy Liikemainto-McCann also includes Finland Group and Womena Finland, Interplan affiliated with Saatchi & Saatchi Advertising; AS & Grey consists of SEK & Grey and MY & Grey.

France Exchange rates: 0.179192 0.182100 franc -1.6%			
Eurocom France, Puteaux MJ	200,934	-14.5	1,340,220
Roux Seguela Cayzac & Goudard	170,034	-4.7	1,128,830
Publicis Conseil, Paris MJ	166,835	-4.2	1,112,832
BBDO France, Paris MJ	137,800	-0.2	786,026
DDB Needham, Paris MJ	76,460	18.2	509,988
Young & Rubicam France, Paris MJ	64,583	-18.9	430,766
Lintas-Paris, Paris MJ	55,006	1.0	366,890
Ogilvy & Mather, Paris MJ	50,496	1.1	348,250
FCA France, Paris MJ	47,608	5.5	347,548
McCann-Erickson France, Paris MJ	46,953	6.4	313,177
Saatchi & Saatchi Advertising, Paris MJ	43,006	1.8	286,707
Groupe Synergie Equateur, Suresnes MJ	41,214	-28.4	236,829
Grey, Paris MJ	38,207	7.0	254,839
CLM/BBDO, Boulogne-Billancourt MJ	31,896	20.0	228,649
Footo, Cone & Belding, Neuilly MJ	27,508	6.4	183,477
Crehalet Foliot Poussielgues, Paris MN	27,237	3.2	180,984
J. Walter Thompson Co., Levallois Perret MJ	22,814	53.2	152,021
Ayer France, Paris MN	19,711	-22.7	130,810
Groupe Bernard Juhiet, Levallois-Perret MJ	18,009	-7.6	22,471
DMB&B, Neuilly MJ	17,673	1.7	119,272
Alice, Paris JV	17,500	19.0	116,600
Bordelais, Lemeunier Leo Burnett, Paris MJ	16,529	1.5	110,199
BSB France, Puteaux MJ	16,306	7.9	108,411
TBWA de Plas, Paris MJ	12,543	-1.6	83,683
GGK Emotion, Paris MJ	11,110	26.0	74,103
Groupe Robert, Paris MJ	10,752	-43.8	71,713
Australie/Al Dente, Levallois Perret MJ	9,945	12.6	66,334
Bozell France, Paris MJ	9,700	-8.5	64,700
MAO, Neuilly MJ	8,870	-13.0	59,163
Eldorado, Paris MJ	8,422	-2.4	58,237
Audour, Soum, Larue/SMS, Paris MJ	7,491	21.5	49,937
Lowe Quadrillage & Associes, Paris MJ	5,376	27.0	35,838
Groupe Organisation & Publicite, Paris MJ	4,923	-3.3	24,243
154-Testa International, Paris MN	4,500	135.4	30,000
Nord/Sud, Paris NE	4,480	NA	29,925
Agency M.K. Group, Paris MJ	4,480	-30.0	29,751
Impulsion, Boulogne Billancourt MJ	4,480	-5.4	29,880
Eurofl, Boulogne Billancourt MJ	4,478	12.8	29,759
Kobs & Draft, Paris MJ	4,470	84.0	29,800
Kilimandjaro, Paris MJ	4,301	-1.6	28,685
B.M.A. Lagon, Paris MJ	3,903	0.5	26,032
H.C.A., Issy les Moulineaux MJ	3,763	-31.1	25,087
CIA Ketchum, Paris MN	2,300	-87.3	22,000
TSA Consultants, Boulogne Billancourt MJ	2,329	5.5	15,538

Foreign agencies (continued)

Agency, city, equity	Gross income	% chg	1991 Billings
France Exchange rates: 0.179192 0.182100 franc -1.6%			
System TV, Neuilly MJ	2,181	-22.0	14,551
Temps Public, Paris MJ	2,013	-16.3	4,366
Conquest Europe France, Paris MJ	1,972	-8.3	13,460
Hakuhodo France, Boulogne MJ	1,899	20.6	7,526
Dimanche, Neuilly MJ	1,792	-10.5	11,952
Herald, Paris NA	986	-9.8	2,329
HVA Conseil, Toulouse NA	800	0.0	2,000

Notes: Young & Rubicam includes Wunderman, Cato Johnson, Sudler & Hennessey, Burson Marsteller and Landor; McCann-Erickson France includes Universal Media, JSC Direct, Promotion France and SP3 agencies; Figures for Black Pencil, Paris, included in totals for Bordelais; Lemeunier Leo Burnett, Groupe Synergie Equateur, Groupe Bernard Juhiet, Groupe Robert, Australie/Al Dente, MAO, Eldorado, Groupe Organisation & Publicite, Impulsion, Eurofl, Kilimandjaro, B.M.A. Lagon, H.C.A., TSA Consultants, System TV, Temps Public and Dimanche are in the Euro RSCG Group; GGK Paris merged with Groupe Emotion; Bozell France includes figures for Bozell Iceberg, Bozell Direct, Bozell Poppe Tyson, Bozell Telemark and Bozell Pacific; Lintas Paris includes PublicMedia France; FCA totals include Columbia Concurrence, OCM, FCA Corporate, ID Marco Polo, Utle, Program, Teleshop, PRA Conseil and Marianne; Crehalet Foliot Poussielgues minority owned by Alliance Int'l.

Germany Exchange rates: 0.606658 0.614400 mark -1.3%			
Lintas Deutschland, Hamburg MJ	72,680	3.3	484,776
Team/BBDO Group Germany, Duesseldorf MJ	70,730	17.0	471,771
Grey Gruppe Deutschland, Duesseldorf MJ	56,116	14.4	374,293
McCann-Erickson Germany, Frankfurt MJ	54,304	-1.8	362,208
Young & Rubicam, Frankfurt MJ	53,079	-1.2	365,883
Eurocom RSCG Group Germany, Duesseldorf MJ	50,595	-31.7	337,484
Ogilvy & Mather, Frankfurt MJ	49,489	5.3	353,491
Scholz & Friends, Hamburg MJ	39,311	48.8	262,137
Publicis FCB, Duesseldorf MJ	39,024	52.7	260,291
J. Walter Thompson Co., Frankfurt MJ	38,646	40.7	269,022
DMB&B Group Germany, Frankfurt MJ	38,353	5.8	341,326
Michael Conrad & Leo Burnett, Frankfurt MJ	37,510	12.0	250,079
Wensauer DDB Needham, Duesseldorf MJ	35,721	7.3	238,256
Saatchi & Saatchi Advertising, Frankfurt MJ	30,212	4.4	201,653
TBWA, Frankfurt MJ	23,720	11.9	158,338
Springer & Jacoby, Hamburg NA	23,599	9.4	157,124
Wilkes Ayer, Hamburg MJ	21,538	-1.8	146,179
Lowe Luerzer, Frankfurt/Duesseldorf MJ	19,601	-2.0	130,670
Baums, Mang & Zimmermann, Duesseldorf MJ	18,294	11.9	122,020
Serviceplan Marketing, Munich NA	17,085	9.7	113,959
Heye & Partner DDB Needham, Munich MN	17,077	4.6	113,907
Spiess Ermsch Abels, Duesseldorf NA	16,683	2.2	111,382
Hildmann, Simon, Rempen & Schmitz/SMS Duesseldorf MJ	15,777	-3.5	105,181
BSB Frankfurt, Frankfurt MJ	14,981	16.2	99,907
von Mannstein Werbeagentur, Solingen NA	13,953	0.8	93,243
Bessers Werbung, Duesseldorf NA	13,346	8.1	86,997
Economia, Hamburg NA	13,331	3.2	88,875
Borsch, Stengel & Partner, Frankfurt NA	12,852	11.3	85,721
Lueders, Cologne NA	9,464	9.7	63,092
DFS & R, Munich NA	8,372	5.6	55,813
Karius & Partner, Leonberg NA	8,311	20.2	55,631
Frese & Wolff, Oldenburg NA	8,251	8.3	54,842
Westag, Cologne NA	8,072	-14.6	53,811
Hanspaul Schellenberg, Stuttgart NA	8,069	25.6	53,689
Ernst & Partner, Duesseldorf NA	7,981	42.2	53,204
Wuendrich-Meissner, Leonberg NA	7,947	10.1	53,204
GGK Frankfurt, Frankfurt MJ	7,778	11.0	51,879
Robert Puetz, Cologne NA	7,735	13.7	51,566
Intercom Medicus, Wiesbaden MJ	7,708	-4.1	95,652
Knopf, Naegeli, Schnakenberg, Hamburg NA	7,644	48.1	50,959
H.F. & P., Duesseldorf NA	7,401	17.6	49,382
Die Gilde Werbeagentur, Hamburg NA	7,284	22.1	48,593
Kobs & Draft Werbeagentur, Hamburg/Stuttgart MJ	6,795	-20.4	45,300
Agentur DAMM, Frankfurt NE	6,673	8.6	44,286
Hakuhodo Deutschland, Duesseldorf MJ	6,579	29.7	43,316
RTS Rieger, Stuttgart NE	5,879	20.1	38,826
FCA, Duesseldorf MJ	5,460	16.9	36,399
Guetlig & Hoffmeister Alliance, Frankfurt MN	4,793	-3.7	31,789
Holtkamp Mueller Kantenich & May, Duesseldorf MJ	3,890	31.9	25,947
Bozell Werbeagentur, Frankfurt MJ	3,579	24.0	23,902
Ayer Werbeagentur, Frankfurt MJ	3,185	15.2	21,233
Ketchum Advertising/Germany, Mainz MJ	2,400	71.3	16,000
Conquest Europe Germany, Frankfurt MJ	1,124	22.8	8,748
Wirz & Hafner, Frankfurt MN	1,001	NA	6,673

Notes: Young & Rubicam includes Wunderman, Cato Johnson, Sudler & Hennessey and Burson Marsteller; GGK closed GGK Duesseldorf and GGK Communications in 1991; Holtkamp Mueller Kantenich & May majority owned by BBDO; Paris, McCann-Erickson Germany includes figures for McCann International, McCann Promotion, Media Intensus and Artwork; RTS Rieger affiliated with Saatchi & Saatchi Advertising; Team/BBDO Group Germany includes offices in Duesseldorf, Hamburg, Frankfurt, Bonn and Munich; BBDO Business Communications, Team Direct and Hildmann & Schneider, Duesseldorf; Bitter com Medicus part of DMB&B.

Greece	Exchange rates: 0.005583 0.006340 drachma -11.9%		
BBDO Group Greece, Athens MJ	11,227	56.6	74,887
Spot/Thompson Advertising, Athens MN	9,811	23.8	64,102
Lintas-Athens, Athens MJ	7,300	47.3	48,692
Bold Advertising/Ogilvy & Mather, Athens MN	6,821	29.6	45,470
Olympic DDB Needham, Athens MJ	6,627	37.5	44,202
Adel/SSA, Athens JV	5,600	2.4	27,189
Leo Burnett Co., Athens MJ	5,187	27.3	34,580
McCann-Erickson Hellas, Athens MJ	4,082	20.9	27,094
Gnomi/Publicis FCB, Athens MN	4,040	47.8	22,103
Gee-Young & Rubicam, Athens MN	3,093	22.4	20,630
Alector Advertising, Athens NA	2,931	21.9	15,353
J.N. Leoussis, Athens NA	2,568	-10.0	11,724
BSB Athens, Athens MJ	2,476	20.4	16,504

Gross Townsend Frank Hoffman			
U.S.	1991	1990	% chg
Gross income	\$15.7	\$11.7	34.2
Volume	\$104.7	\$78.1	34.1
Employees	114	106	7.5
Offices	1	1	0.0

Offices: Alan Gross, pres

Headquarters: Gross Townsend Frank Hoffman/

114 Fifth Ave./New York, N.Y. 10011/Phone:

(212) 886-3000

Officer: Al Garcia-Serra, chmn
Headquarters: GS&B Lintas/4104 Aurora St./
Coral Gables, Fla. 33146/Phone: (305) 444-4221

Lintas/Marketing Communications

U.S.	1991	1990	% chg
Gross income	\$44.8	\$48.3	-7.2
Volume	\$298.7	\$321.9	-7.2
Employees	349	349	0.0
Offices	2	2	0.0

Officer: Frank Hoag, chmn-cco
Headquarters: Lintas Marketing Communications/One Dag Hammarskjöld Plaza/New York, N.Y. 10017/Phone: (212) 605-8000

Long, Haymes & Carr

U.S.	1991	1990	% chg
Gross income	\$13.1	\$15.1	-12.6
Volume	\$87.7	\$100.8	-13.0
Employees	145	163	-11.0
Offices	1	1	0.0

Officer: Donald N. Adams, chmn-cco
Headquarters: Long, Haymes & Carr/148 Charlton Blvd., P.O. Box 5627/Winston-Salem, N.C. 27113/Phone: (919) 765-3630

Low Group

Worldwide	1991	1990	% chg
Gross income	\$220.4	\$196.5	12.1
Volume	\$1,551.4	\$1,382.3	11.4
Employees	1,087	1,200	-9.4
Offices	21	23	-8.7

U.S.	1991	1990	% chg
Gross income	\$79.2	\$79.0	0.3
Volume	\$610.3	\$609.0	0.2
Employees	600	635	-5.5
Offices	8	8	0.0

Low & Partners

U.S.	1991	1990	% chg
Gross income	\$45.7	\$45.5	0.4
Volume	\$325.3	\$325.3	0.0
Employees	290	318	-8.8
Offices	3	3	0.0

European offices	Billings
Low España, Barcelona/Madrid(MJ)	73.0
Low Howard-Spink, London(MJ)	464.1
Low Kuiper & Scheuten, Amsterdam(MJ)	45.4
Low Luerzer, Frankfurt/Duesseldorf(MJ)	130.7
Low Quadrifoglio & Associates, Paris(MJ)	35.8
Low Troost, Brussels(MJ)	68.4
Pirella Göttsche Lowe, Milan/Rome(MJ)	145.6
Canadian offices	Billings
Deacon Day Advertising, Toronto(MN)	26.2

Notes: Consolidated Low Group returns are for Low's worldwide network and two U.S. shops. Low & Partners and Laurence, Charles, Free & Lawson, the latter of which is independent from Low but linked structurally within IPG. The Low Group's non-media gross income of \$37.2 million on billings of \$248.7 million in 1991, both down 19%, is included in Low Group's non-U.S. totals. The heretofore London-based group established a co-headquarters in New York in 1991 at its Low & Partners operation.

Officer: Lower Group: Frank Lowe, chmn-cco; Lucinda Holmes, exec vp-gm. Les Delano, exec dir-Lowe Group N. Amer.; Chris Morley, gm-Lowe Group Europe; Henry Strook, exec vp-cfo. Lowe & Partners: Andrew J. Langer, cco; John Hayes, pres. Richard Villante, vice chmn
Headquarters: Lower Group/Bowater House, 88-114 Knightsbridge/London SW1X7LT, England/Phone: 4471-225-3434/Fax: 4471-581-5742
Low & Partners/1345 Avenue of the Americas/New York, N.Y. 10105/Phone: (212) 708-8800

Laurence, Charles, Free & Lawson

U.S.	1991	1990	% chg
Gross income	\$33.5	\$33.5	0.0
Volume	\$285.0	\$284.0	0.4
Employees	310	317	-2.2
Offices	5	5	0.0

Officer: Charles Goldschmidt, chmn
Headquarters: Laurence, Charles, Free & Lawson/240 Madison Ave./New York, N.Y. 10016/Phone: (212) 213-4444

McCann-Erickson Worldwide

Worldwide	1991	1990	% chg
Gross income	\$811.6	\$757.0	7.2
Volume	\$5,413.5	\$5,049.4	7.2
Employees	8,863	8,727	1.6
Offices	NA	NA	NA
U.S.	1991	1990	% chg
Gross income	\$224.2	\$210.1	6.7
Volume	\$1,495.1	\$1,401.4	6.7

U.S.	1991	1990	% chg
Employees	1,863	1,688	11.6
Offices	13	12	8.3

U.S. offices	Billings
McCann-Erickson, New York	724.0
McCann-Erickson, Houston	73.0
McCann-Erickson, Atlanta	63.0
McCann-Erickson, Los Angeles	128.0
McCann-Erickson, Detroit	153.0
McCann-Erickson, Seattle	30.0
McCann-Erickson, San Francisco	143.0
McCann-SAB, Detroit	38.0
Phillips-Ramsey, San Diego	38.0
Phillips-Ramsey, Phoenix	6.0

Asian offices	Billings
McCann-Erickson, Seoul(MJ)	20.8
McCann-Erickson, Hong Kong(MJ)	41.0
McCann-Erickson, Sydney(MJ)	110.1
McCann-Erickson, Beijing(MJ)	4.6
McCann-Erickson, Kuala Lumpur(MJ)	26.2
McCann-Erickson, Auckland(MJ)	24.3
McCann-Erickson, Manila(MJ)	25.2
McCann-Erickson, Singapore(MJ)	26.4
McCann-Erickson, Taipei(MJ)	40.2
McCann-Erickson, Bangkok(MJ)	24.6
McCann-Erickson, Tokyo(MJ)	702.5
Taro Shiba McCann-Erickson, New Delhi(MN)	11.1
European offices	Billings
McCann-Erickson, Warsaw(MJ)	1.8
Jordan McCann-Erickson, Zagreb(MJ)	7.4
McCann-Erickson Group, Madrid(MJ)	231.6
McCann-Erickson, Dublin(MJ)	0.9
McCann-Erickson, Vienna(MJ)	38.4
McCann-Erickson, Copenhagen(MJ)	18.3

European offices	Billings
McCann-Erickson Belgium, Brussels(MJ)	126.4
McCann-Erickson Czechoslovakia, Prague(MJ)	NA
McCann-Erickson France, Paris(MJ)	313.2
McCann-Erickson Germany, Frankfurt(MJ)	382.2
McCann-Erickson Hellas, Athens(MJ)	27.1
McCann-Erickson Interpress, Budapest(MJ)	7.5
McCann-Erickson Italiana, Milan(MJ)	316.5
McCann-Erickson Nederland, Amsterdam(MJ)	90.4
McCann-Erickson Portugal, Lisbon(MJ)	102.7
McCann-Erickson Sweden, Stockholm(MJ)	105.6
McCann-Erickson Switzerland, Zurich(MJ)	67.0
McCann-Erickson UK, London(MJ)	447.7
Novosti McCann-Erickson, Moscow(MJ)	NA
Oy Likemainskaya-McCann, Moscow(MJ)	71.8
Pers McCann-Erickson, Istanbul(MJ)	30.4
Revistas Mac McCann, Oslo(MJ)	29.9

Latin American offices	Billings
Comte McCann-Erickson, Panama City(MJ)	5.7
Esca McCann-Erickson, La Paz(MJ)	0.5
McCann-Erickson, Buenos Aires(MJ)	31.0
McCann-Erickson, St. Michael(MJ)	4.0
McCann-Erickson, San Juan(MJ)	20.7
McCann-Erickson, Guayaquil(MJ)	13.0
McCann-Erickson, Sao Paulo(MJ)	219.3
McCann-Erickson, Tegucigalpa(MJ)	3.7
McCann-Erickson, San Salvador(MJ)	4.4
McCann-Erickson, San Jose(MJ)	7.6
McCann-Erickson, Santiago(MJ)	27.2
McCann-Erickson, Bogota(MJ)	33.5
McCann-Erickson, Santo Domingo(MJ)	6.3
McCann-Erickson, Jamaica, Kingston(MJ)	2.6
McCann-Erickson, Mexico City(MJ)	109.9
McCann-Erickson, Managua(MJ)	0.5
McCann-Erickson, Asuncion(MJ)	0.7
McCann-Erickson, Lima(MJ)	12.8
McCann-Erickson, Caracas(MJ)	37.5
McCann-Erickson, Port of Spain(MJ)	15.0
McCann-Erickson, Montevideo(MJ)	6.8
McCann-Erickson, Guatemala City(MJ)	10.7
Other offices	Billings
McCann-Erickson Canada, Toronto(MJ)	202.1
McCann Group, Johannesburg(MJ)	39.2
McCann-Erickson Kenya, Nairobi(MJ)	7.7
McCann-Erickson, Casablanca(MJ)	2.5

Notes: Consolidated McCann-Erickson Worldwide returns include the M-E network worldwide and specialty shops McCann Direct and McCann Healthcare.

Officer: Robert L. James, chmn-cco; John J. Dooner Jr., pres-cco; Max Cunniff, exec vp, regional dir-Europe; Michael Ferrer, exec vp, regional dir-Asia-Pacific; Jens Olsen, exec vp, regional dir-Latin Amer.; Michael Bennett, exec vp, regional dir-Europe
Headquarters: McCann-Erickson Worldwide/750 Third Ave./New York, N.Y. 10017/Phone: (212) 697-6000

McCann Direct			
U.S.	1991	1990	% chg
Gross income	\$7.2	\$6.0	20.0
Volume	\$48.0	\$40.0	20.0
Employees	277	245	13.1
Offices	23	21	9.5

Officer: William Morrissey, exec vp-worldwide dir
Headquarters: McCann Direct/750 Third Ave./New York, N.Y. 10017/Phone: (212) 286-0400

McCann Healthcare				
U.S.	1991	1990	%	
Gross income	\$4.5	\$4.2		
Volume	\$30.0	\$28.0		
Employees	36	30		2
Offices	1	1		

Officer: Hugh Thurnauer, sr vp-dir client svcs
Headquarters: McCann Healthcare/425 N. Michigan Ave./Chicago, Ill. 60611/Phone: (312) 266-9200

RANK: 27

I&S Corp.
Tokyo
Gross income: \$106.1 million

Organization totals (\$ in millions)			
Worldwide	1991	1990	%
Gross income	\$136.1	\$104.1	
Volume	\$849.0	\$833.0	
Employees	1,000	950	
Offices	11	11	

Notes: Worldwide returns in tables are all U.S. dollars.

Notes: Worldwide returns in tables are all from Japan
Officer: M. Suzuki, chmn; K. Sugiyama, pres-cco; I. Suzuki, sr vp; K. Kishida, vp
Headquarters: I&S Corp. 1-5-3 Nishimachi-Morimachi, Chuo-ku/Tokyo 103, Japan/Phone: 813-3246-8500/Fax: 813-3246-8787

RANK: 24

Ketchum Communications
Pittsburgh
Gross income: \$127.2 million

Organization totals (\$ in millions)			
Worldwide	1991	1990	% chg
Gross income	\$127.2	\$134.2	-5.2
Volume	\$978.8	\$1,030.4	-5.0
Employees	1,252	1,480	-15.4
Offices	24	26	-7.7
U.S.	1991	1990	% chg
Gross income	\$112.2	\$121.3	-7.5
Volume	\$878.5	\$944.0	-6.9
Employees	1,100	1,226	-10.3
Offices	13	14	-7.1
U.S. offices	Billings		
Ketchum Advertising, New York	241.8		
Ketchum Advertising, Philadelphia	53.7		

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NETWORK, INC.

America's Yellow Pages Connection

U.S. offices	
Ketchum Advertising, Pittsburgh	90.4
Ketchum Advertising, San Francisco	213.8
Ketchum Advertising, Atlanta	12.1
Ketchum Advertising, Louisville	14.9
Ketchum Advertising, Chicago	53.2
Ketchum Advertising, Los Angeles	166.3
Ketchum Advertising, Washington	32.2
Asian offices	
Barrie Robinson & Associates, Sydney (NE)	18.9
Ketchum Advertising (Japan), Tokyo (MJ)	10.7
Ketchum Advertising Singapore, Singapore (MJ)	10.0
P.T. Rama Perwira, Jakarta (NE)	NA

European offices	
Browning, London (MN)	47.0
CIA Ketchum, Paris (MN)	22.0
Ketchum Advertising Germany, Mainz (MJ)	16.0
Canadian offices	
Stranger Veroni Ketchum, Toronto (MN)	2.7

Offices: William H. George, chairman, Paul H. Alvarez, president, Edward L. Graf, vice chairman, Robert W. Kruger, president, Ketchum Advertising, USA.

Headquarters: Ketchum Communications, 6 PPG Place, Pittsburgh, Pa. 15222/Phone: (412) 456-3500

RANK: 25

Lopex

London
Gross income: \$124.0 million

Organization totals (\$ in millions)			
	1991	1990	% chg
Worldwide			
Gross income	\$124.0	\$183.3	-24.1
Volume	\$618.4	\$1,077.9	-24.1
Employees	1,010	1,239	-18.5
Offices	29	35	-20.0
U.S.			
Gross income	\$9.8	\$10.5	-6.6
Volume	\$65.5	\$69.7	-6.0
Employees	160	175	-8.6
Offices	2	2	0.0

Asian offices	
Adstra Alliance, Kuala Lumpur (NE)	4.4
CCAA International Alliance, Hong Kong (NE)	3.5
Core Group Alliance, Manila (NE)	1.4
Golden Flower Alliance, Taipei (NE)	9.0
P.T. Mega Dasa Pariwara Alliance, Jakarta (NE)	3.4
Tropical Alliance, Singapore (MJ)	4.8
European offices	
Alliance Int'l, U.K. (London) (MJ)	140.4
Arka Alliance, Dublin (MJ)	28.0
BGR Alliance, Barcelona (MN)	55.5
Chehalat Foliot Pousseguez, Paris (MN)	181.0
Epsilon-Epsilon Alliance, Athens (NE)	4.6
Gutling & Hoffmeister Alliance, Frankfurt (MN)	31.8
Sheller & Partner Alliance, Zurich (MN)	4.1
PVR Alliance, Helsinki (NE)	6.3
Sensender Alliance, Stockholm (NE)	12.8
Timing Alliance, London (MJ)	19.0
Young Advertising, Dublin (MJ)	12.8
Canadian office	
Miller Myers Bruce DellaCosta Alliance, Toronto (MJ)	18.5

Notes: Lopex controls management finances of Alliance International network and owns controlling interest in Alliance International holding.

Consolidation note

Agencies are shown by 1991's return in profiles of the World's Top 500 Agency Organizations. However, only their equity portion is included in the parent organization's totals comprising the ranking.

ing company. Agencies listed in this profile hold shares in Alliance. Lopex in turn owns varying percentages of most of the Alliance shops, including 100% of Alliance International U.K., the network's largest, and 41% of Warwick Baker & Fiero, New York, the second largest. Folded into totals are Lopex's non-advertising results of \$67.2 million gross income in 1991 vs. \$105.2 million in 1990, and \$448 million in billings in 1991 vs. \$701.2 million in 1990. This non-advertising business (all U.K. operations) includes Purchasepoint Group, a sales promotion, incentive, training agency; Design in Action, RCP, database marketing, Riley, recruitment advertising, Research Services, market research, although sold in January 1992; and the Grayling Group, a pr and lobbying unit in U.K., France, Benelux and Ireland. Lopex and Alliance severed ties with five shops in 1991. Their figures were not included in totals for both years. Three of them, Prad Alliance, Amsterdam, HVR, The Hague, and L.V.H. Brussels, were sold by Lopex to Publicis Communications in mid-1991. Studio Marketing, Iqbaljiana, Slovenia, and Brandt & Falk, Copenhagen, were dropped from the Alliance network, although Lopex never held equity in the agencies. Another Alliance agency, Publi-market Ideas, Milan, did not report billings. Part of the shop was sold to Omnicom, although Lopex still retains its 14.1% share. Its figures were omitted for both years. Offices and employee numbers are for the Alliance network and not Lopex's non-advertising units.

Offices: Lord Marsh, non-exec chairman; Peter Thomas, exec. Barrie Warman, group finance dir.

Headquarters: Lopex/Alliance House/63 St. Martin Lane/London WC2N 4BH, England/Phone: 4471-838-2281/Fax: 4471-240-7612

Warwick Baker & Fiero

U.S.			
	1991	1990	% chg
Gross income	\$24.0	\$25.8	-6.8
Volume	\$160.0	\$170.0	-5.9
Employees	160	175	-8.6
Offices	2	2	0.0

Offices: Walter D. Baker, chairman; Robert J. Fiero, president/creative officer; Ronald S. Fierman, exec. vp. gen. mgt.; Susan Small-Ward, exec. vp. chief planning officer.

Headquarters: Warwick Baker & Fiero/100 Avenue of the Americas/New York, N.Y. 10013/Phone: (212) 941-4200

RANK: 31

Man Nen Sha

Osaka, Japan
Gross income: \$91.1 million

Organization totals (\$ in millions)			
	1991	1990	% chg
Worldwide			
Gross income	\$91.1	\$87.0	4.7
Volume	\$588.0	\$566.0	3.9
Employees	470	460	2.2
Offices	11	11	0.0

Notes: Man Nen Sha includes equity returns from Man Nen Sha International, a Tokyo agency 12.5% owned, Man Nen Sha Agency in Kyoto, 49% owned, and trunk agency Man Nen Sha, Osaka. Worldwide returns in tables are all from Japan.

Offices: Tsunepi Higashi, chairman; Osamu Hirokawa, president.

Headquarters: Man Nen Sha/5-13, Awamori 1-Chome, Chuo-ku/Osaka 541, Japan/Phone: 816-282-2212/Fax: 816-227-1051

RANK: 38

Nihon Keizai Advertising

Tokyo
Gross income: \$63.8 million

Organization totals (\$ in millions)

Worldwide			
	1991	1990	% chg
Gross income	\$63.8	\$62.5	1.8
Volume	\$369.8	\$366.3	6.4
Employees	554	530	4.5
Offices	16	15	6.7

Notes: Worldwide returns in tables are all from Japan.

Offices: Taketoshi Yamazaki, chairman; Yasuo Shimada, president; Hiroshi Takeda, managing director; Mitsunori Imai, managing director.

Headquarters: Nihon Keizai Advertising/13-20, Ginza 3-Chome, Chuo-ku/Tokyo 104, Japan/Phone: 813-3542-0411/Fax: 813-3546-2707

RANK: 4

Omnicom Group

New York
Gross income: \$1,471.2 million

Organization totals (\$ in millions)

Worldwide			
	1991	1990	% chg
Gross income	\$1,471.2	\$1,349.0	9.1
Volume	\$10,442.9	\$9,813.2	6.4
Employees	12,218	12,268	-0.4
Offices	371	359	3.3

U.S.

	1991	1990	% chg
Gross income	\$678.4	\$668.2	1.5
Volume	\$5,169.3	\$5,080.8	1.7
Employees	5,817	6,353	-8.4
Offices	91	101	-9.9

Notes: Agency mega-units in Omnicom, a holding company, include BBDO Worldwide, DDB Needham Worldwide, Tracy-Locke and Diversified Agency Services, a collection of agencies whose figures are included in consolidated returns for either BBDO and DDB Needham depending on which network brought the agencies into Omnicom.

Offices: Bruce Crawford, president; Fred J. Meyer, chairman; Raymond E. McGovern, secretary and counsel.

Headquarters: Omnicom Group/400 Madison Ave./New York, N.Y. 10022/Phone: (212) 413-3000

BBDO Worldwide

Consolidated returns (\$ in millions)

Worldwide			
	1991	1990	% chg
Gross income	\$772.5	\$773.6	-0.1
Volume	\$5,498.7	\$5,291.7	3.6
Employees	6,048	5,739	5.4
Offices	242	213	13.9

U.S.			
	1991	1990	% chg
Gross income	\$371.9	\$370.4	0.4
Volume	\$2,718.8	\$2,672.8	1.6
Employees	3,078	3,301	-6.8
Offices	50	51	-2.0

U.S. offices	
BBDO Worldwide, Minneapolis	67.9
BBDO Worldwide, Atlanta	249.6
BBDO Worldwide, Los Angeles	166.5
BBDO Worldwide, Southfield, Mich.	149.7
BBDO Worldwide, New York	711.6
BBDO, Chicago	121.1
TFB-BBDO, Fort Alta, Calif.	37.8
Asian offices	
BBDO Asia Pacific, Hong Kong (MJ)	4.3
BBDO Hong Kong, Hong Kong (MJ)	40.7
PAC-BBDO, Manila (MN)	9.7
R.K. Swamy-BBDO, Madras (MN)	24.0
Spencer-BBDO Advertising, Singapore (MJ)	17.4
Stellar-BBDO, Taipei (MJ)	12.5
Wings-BBDO, Peking/Jaya (MJ)	13.2

European offices	
Abbott Mead Vickers-BBDO, London (MN)	271.0
Art-BBDO Business Communications, Helsinki (NE)	11.4
Alise-BBDO, Istanbul (MN)	9.7
Antena-BBDO, Lisbon (MJ)	15.6
ASGS-BBDO Group, Zurich (MN)	67.4
Bartels-Vandekamp, Amsterdam (MJ)	30.3
BBDO Group Greece, Athens (MJ)	74.9
BBDO Marketing, Moscow (MJ)	2.2
BBDO Zagreb, Zagreb (MJ)	4.1
BBDO-España, Barcelona (MJ)	259.6
CLM-BBDO, Budapest-Belgrade (MJ)	228.6
Contrapunto, Madrid (MN)	171.3
Ehrenströme & Co., Stockholm (MJ)	25.2
HLR & Co.-BBDO Reklambyrå, Stockholm (MN)	34.9
Italia-BBDO, Milan (MJ)	180.1
Jensen & Berntsen 3 & S., Oslo (MJ)	8.3
Jensen & Berntsen-BBDO, Oslo (MN)	41.5
Mark-BBDO, Prague (NE)	2.3
Moore-BBDO, Brussels (MJ)	19.2
Murphy & Partners, Antwerp (MJ)	9.2
By Agent-BBDO, Helsinki (NE)	6.7
Team-BBDO, Copenhagen (MJ)	80.4
Team-BBDO, Vienna (MJ)	43.3
Team-BBDO Group Germany, Dusseldorf (MJ)	471.8
Topreklam-BBDO, Budapest (NE)	4.2
VVL-BBDO, Bratislava (MJ)	46.3

Latin American offices	
ABM-Zagreb, Santiago (MN)	0.4
ALMAP-BBDO Comunicaciones, San Paulo (MN)	92.4
Alonso-BBDO, Bogota (NE)	14.4
BBDO de Chile, Santiago (MN)	27.2
BBDO Puerto Rico, Hato Rey (MJ)	37.0
David-Ratio-BBDO, Buenos Aires (MN)	18.4
Diestro-BBDO, Mexico City (MN)	31.8
Gentier-BBDO, San Jose (NE)	20.9
PVA-BBDO, Caracas (MN)	7.3

Other offices	
Baker-Lovick-BBDO, Toronto (MN)	125.6
Impact & Echo, Kuwait City (MN)	2.3
Impact-BBDO, Jordan (MN)	6.4

Foreign agencies (continued)

Agency, city, equity		Gross income	% chg	1991 Billings
Greece Exchange rates: 0.005583 drachma 0.006340 drachma -11.9%				
DM&S, Athens MJ		1,639	20.2	9,080
Magnet Advertising, Athens NA		1,362	28.1	6,532
ProAd O&M Direct, Athens MN		1,033	20.7	7,230
RSCG Polavida, Athens MJ		1,027	75.5	5,856
Satchi & Satchi Direct, Athens JV		826	37.2	4,690
Grey, Athens MJ		737	1.1	4,913
Echo Advertising, Salonica NA		737	-1.5	5,226
Epsilon-Epsilon Alliance, Athens NE		687	14.4	4,578
Conquest Europe Greece, Athens JV		678	99.4	4,580
Bozell Graw, Athens NE		536	65.8	4,667
Win Communications, Athens NA		431	47.8	1,563
Enterprise Middle East, Athens MJ		342	-9.8	2,280
Eurocom/Target Advertising, Athens MJ		284	-66.9	5,616
Kobs & Draft Heffas, Athens NE		270	5.9	1,800
Victory, Athens NA		243	3.5	1,943

Notes: BBDO Group includes BBDO Athens, Greece; Global Advertising, From Athens; BBDO Direct and BBDO Business Communications, Enterprise Middle East, Athens, majority owned by Leo Burnett Co.; does business in the Middle East.

Guatemala Exchange rates: 0.231000 quetzal 0.103050 quetzal 19.7%				
Publicidad McCann-Erickson, Guatemala City MJ		1,608	63.2	10,725
Comunica Publicidad, Guatemala City NE		1,410	89.9	9,404
Eco Publicidad, Guatemala City NE		949	NA	1,462
Forle, Cone & Seiding, Guatemala City MJ		595	46.1	3,967
APCU Thompson Asociados, Guatemala City MN		531	44.8	3,511
Modernable Publicidad, Guatemala City MN		149	37.5	995

Notes: Comunica Publicidad affiliated with Leo Burnett Co.; Modernable Publicidad 50% equity held by Ogilvy & Mather; Eco Publicidad affiliated with Young & Rubicam.

Hong Kong Exchange rates: 0.128633 Hong Kong dollar 0.128400 Hong Kong dollar 0.2%				
Ogilvy & Mather, Hong Kong MJ		15,077	7.0	103,981
Leo Burnett Co., Hong Kong MJ		11,280	10.0	75,206
J. Walter Thompson Co., Hong Kong MJ		10,621	12.9	70,805
DOB Needham DMK, Hong Kong MJ		8,652	55.5	57,708
Dentsu, Young & Rubicam Hong Kong Hong Kong MJ		8,227	12.8	54,872
Bell Partnership, Hong Kong MJ		7,960	2.2	53,067
Backer Spielvogel Bates, Hong Kong MJ		7,442	13.6	49,639
Grey Hong Kong, Hong Kong MJ		6,516	32.3	43,478
Bozell, Hong Kong MJ		6,214	22.0	41,428
McCann-Erickson, Hong Kong MJ		6,146	15.1	40,994
BBDO Hong Kong, Hong Kong MJ		5,640	-13.6	40,710
Satchi & Satchi Advertising, Hong Kong MJ		4,555	18.3	30,872
K&O Asia, Hong Kong MJ		3,585	20.1	23,900
DM&B Medway, Hong Kong MJ		3,240	14.7	19,684
Lintas-Hong Kong, Hong Kong MJ		2,844	4.8	18,973
Forle, Cone & Seiding, Hong Kong MJ		2,212	17.7	14,754
Asatse International, Hong Kong MJ		2,013	40.8	12,581
Lee Davis Ayer Advertising, Hong Kong MN		1,957	4.6	13,077
Hakuhodo Hong Kong, Hong Kong MJ		704	10.2	4,628
BBDO Asia Pacific, Hong Kong MJ		638	-31.5	4,258
CCAA International/Alliance, Hong Kong NE		521	10.3	3,473
Medias Intercon Pacific, Hong Kong MJ		449	-51.0	3,431

Notes: Medias Intercon Pacific also includes figures for offices in Singapore and Manila.

Hungary Exchange rates: 0.014500 forint 0.014555 forint -11.5%				
Ogilvy & Mather, Budapest MJ		1,499	64.8	10,341
Young & Rubicam Hungary, Budapest MN		1,455	-5.4	9,705
McCann-Erickson Interpress, Budapest MJ		1,126	122.5	7,510
GGH Budapest, Budapest MN		1,059	101.0	7,033
BSB-S&S Advertising, Budapest JV		943	NA	6,287
Topreklam-BBDO, Budapest NE		723	39.8	4,177
RSCG Havasi & Varga, Budapest MJ		609	15.7	2,784
Grey, Budapest JV		271	17.7	1,866
DM&B-Profil M, Budapest MJ		250	NA	1,600

Notes: BBDO Worldwide acquired 50% equity in 1992 in Topreklam-BBDO.

India Exchange rates: 0.046208 rupee 0.057400 rupee -19.5%				
Hindustan Thompson Associates, Bombay NE		10,068	-7.6	67,118
Lintas-India, Bombay MN		9,060	4.3	60,433
Mudra Communications, Ahmedabad NE		5,023	-10.1	33,510
Ogilvy & Mather, Bombay MN		4,828	6.5	33,290
Ulka Advertising, Bombay NE		4,095	14.2	27,309
R.K. Swamy-BBDO, Madras MN		3,596	31.6	23,988
Everest Advertising, Bombay-New Delhi NE		2,888	-15.7	19,278
Chaitra Advertising, Bombay MN		2,241	0.1	14,925
Clarion Advertising Services, Calcutta NA		2,218	-16.0	14,694
Contract Advertising, Bombay MN		2,042	-12.0	13,616
Trikeya Grey, Bombay MN		1,796	-9.1	11,978
MAA Communications, Bangalore NA		1,784	1.5	11,675
Tara Sinha McCann-Erickson, New Delhi MN		1,664	177.3	11,091
Sista's Private, Bombay NE		1,178	-9.1	7,859
Arms Bozell, New Delhi NE		356	24.0	2,394
Rake Advertising & Marketing, Bombay NA		284	5.2	1,893

Notes: Non-equity affiliates: Madras Communications, with DDB Needham; Ulka Advertising with Leo Burnett Co.; Everest with Satchi & Satchi Advertising; Chaitra with Leo Burnett Co.; Sista's Private with Backer Spielvogel Bates; J. Walter Thompson Co. holds 80% equity in Contract Advertising.

Indonesia Exchange rates: 0.000510 rupiah 0
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Seven-year U.S.-agency gross income & billings review

Total gross income

Total capitalized billings

Year	Worldwide % chg		U.S. % chg		Foreign % chg		Worldwide % chg		U.S. % chg		Foreign % chg	
1991	\$13,567.7	4.7	\$7,648.9	2.9	\$5,918.8	7.0	\$96,341.0	4.1	\$56,161.3	3.1	\$40,179.7	5.5
1990	12,964.8	13.4	7,431.6	6.2	5,533.2	24.9	92,568.5	15.5	54,467.3	8.9	38,101.2	26.6
1989	11,429.0	1.7	6,998.5	2.5	4,430.5	0.4	80,134.8	2.8	50,033.5	3.6	30,101.3	1.4
1988	11,238.3	16.9	6,827.5	9.8	4,410.8	29.9	77,988.9	18.7	48,299.2	12.4	29,689.7	30.6
1987	9,613.1	11.1	6,217.7	-4.4	3,395.4	58.2	65,702.4	10.8	42,971.2	-4.0	22,731.2	55.9
1986	8,648.9	5.8	6,502.2	3.8	2,146.7	12.3	59,318.8	6.3	44,740.8	8.1	14,578.0	1.0
1985	8,174.6	14.7	6,262.2	18.7	1,912.4	3.2	55,805.5	15.2	41,371.8	15.3	14,433.7	15.0

Notes: Dollars are in millions. Change is computed from previous years' figures, including 1984, not shown. All figures are constant, representing reporting by the top 500 U.S.-based agencies in the year given, except 1990 which is restated to reflect agency reporting in 1991.

Other offices
 Impact/BDO Cairo, Cairo(MN) 1.3
 Impact/BDO Dubai, Dubai(MN) 3.7
 Impact/BDO International, Nicosia(MN) NA

Notes: BBDO Worldwide totals include the BBDO domestic and international network (including 46.67% equity in another World's Top 50 agency, Clemenger/BBD, Melbourne), Tracy-Locke, and five Diversified Agencies: Doremus & Co., Lavey/Wolff/Swift, Frank J. Corbett Inc., Baxter, Gurian & Mazzei and half of Rapp Collins Maroon. Figures for Ammirati & Puris, sold in 1990, were excluded from BBDO's 1990 totals. Tracy-Locke includes the Dallas agency of the same name and Altschiller Reitzfeld/Tracy-Locke, New York.

Officers: Allen Rosenshine, chmn-ceo, Jim Cannon, vice chmn-ceo, Phil Dusenberry, vice chmn-BBDO Worldwide, chmn-ceo-BBDO N.Y., Tom Clark, vice chmn-BBDO Worldwide, chmn-BBDO N. Amer.

Headquarters: BBDO Worldwide/1285 Avenue of the Americas/New York, N.Y. 10019/Phone: (212) 459-5000

Baxter, Gurian & Mazzei			
U.S.	1991	1990	% chg
Gross income	\$5.1	\$5.0	2.9
Volume	\$34.2	\$33.0	3.6
Employees	36	45	-20.0
Offices	2	2	0.0

Officers: Kenneth J. Gurian, chmn-ceo, Donald J. Baxter, vice chmn, Joseph Doyle, pres.
Headquarters: Baxter, Gurian & Mazzei/8501 Wilshire Blvd., Suite 220/Beverly Hills, Calif. 90211/Phone: (310) 657-5050

Frank J. Corbett Inc.			
U.S.	1991	1990	% chg
Gross income	\$11.9	\$10.2	16.3
Volume	\$79.3	\$68.2	16.3
Employees	85	76	11.8
Offices	1	1	0.0

Officers: John J. Fisher, chmn.
Headquarters: Frank J. Corbett Inc./211 E. Chicago Ave., Suite 1100/Chicago, Ill. 60611/Phone: (312) 664-5310

Doremus & Co.			
Worldwide	1991	1990	% chg
Gross income	\$13.0	\$15.5	-16.0
Volume	\$95.7	\$111.3	-14.0
Employees	153	175	-12.6
Offices	5	5	0.0
U.S.	1991	1990	% chg
Gross income	\$11.5	\$14.1	-18.6
Volume	\$86.5	\$102.1	-15.3
Employees	141	163	-13.5
Offices	4	4	0.0

European office
 Doremus & Co., London(MJ) 9.2

Officers: Curtis Troeger, ceo, Carl Anderson, exec vp-cfo, John Eckelberry, exec vp.
Headquarters: Doremus & Co./200 Varick St./New York, N.Y. 10014/Phone: (212) 366-3000

Lavey/Wolff/Swift			
U.S.	1991	1990	% chg
Gross income	\$21.6	\$20.4	6.1
Volume	\$144.3	\$136.0	6.1
Employees	258	154	67.5
Offices	6	5	20.0

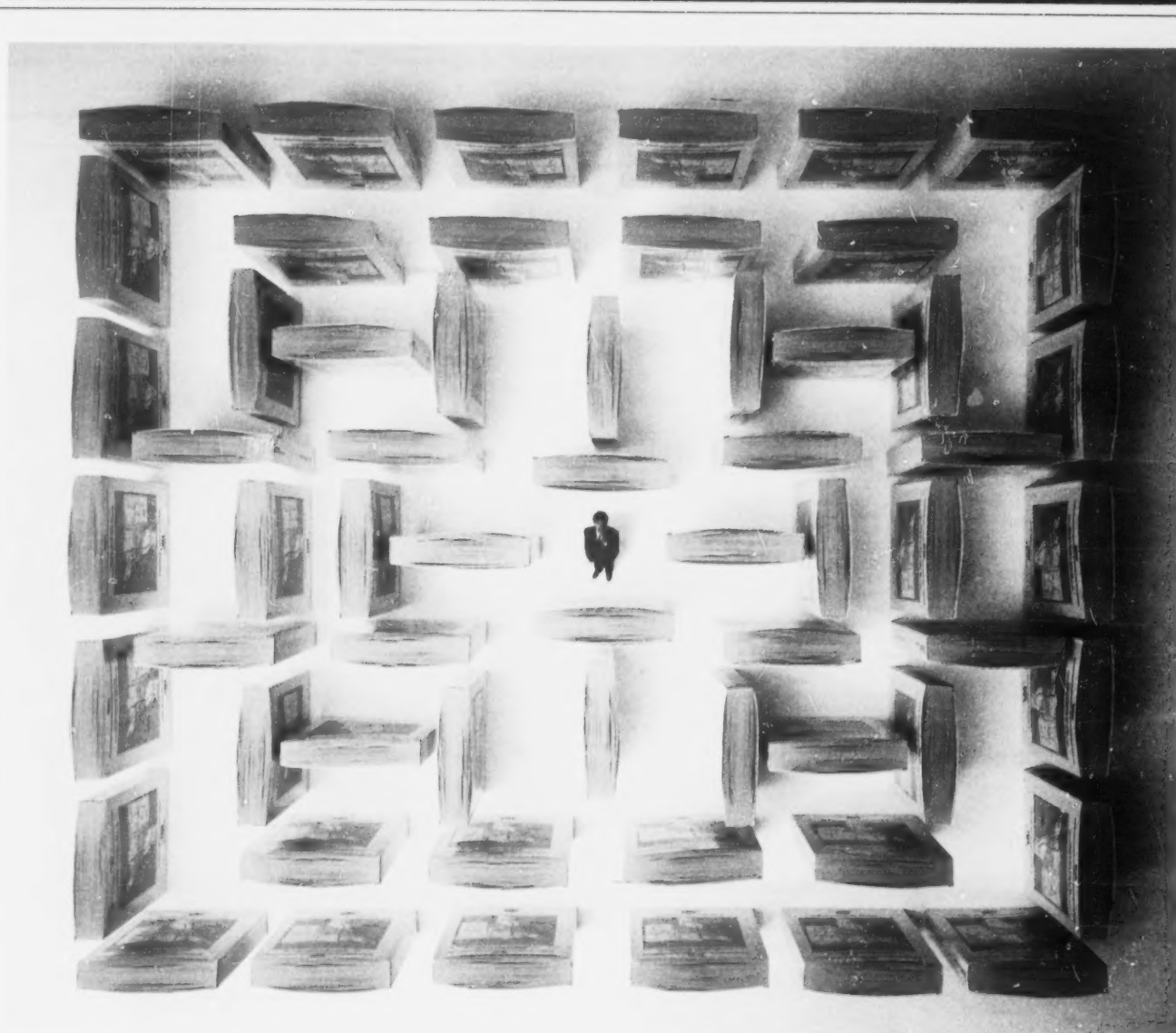
Officers: John F. Swift, pres-ceo, Kenneth H. Lavey, chmn-creative dir, Charles A. Rockefeller, exec vp, Stephen I. Weiss, vp-finance.
Headquarters: Lavey/Wolff/Swift/488 Madison Ave./New York, N.Y. 10022/Phone: (212) 593-3630

Tracy-Locke			
U.S.	1991	1990	% chg
Gross income	\$54.5	\$57.1	-4.5
Volume	\$395.4	\$406.3	-2.7
Employees	588	631	-6.8
Offices	3	3	0.0

U.S. offices
 Altschiller Reitzfeld/Tracy-Locke, New York 51.5
 Tracy-Locke, Los Angeles 11.0
 Tracy-Locke, Dallas 332.9

Officer: Howard Davis, pres.
Headquarters: Tracy-Locke/200 Crescent Ct./Dallas, Texas 75201/Phone: (214) 969-9000

DDB Needham Worldwide			
Consolidated returns (\$ in millions)			
Worldwide	1991	1990	% chg
Gross income	\$690.4	\$625.2	11.7
Volume	\$5,034.3	\$4,591.5	9.6
Employees	6,800	6,450	5.4
Offices	129	134	-3.7
U.S.	1991	1990	% chg
Gross income	\$306.4	\$297.8	2.9
Volume	\$2,452.5	\$2,407.9	1.9
Employees	2,741	3,025	-9.4
Offices	41	46	-10.9
U.S. offices			
DDB Needham, Denver	17.2		
DDB Needham, Los Angeles	186.2		
DDB Needham, Chicago	622.2		
DDB Needham, New York	574.7		
DDB Needham, McLean, Va.	28.3		
DDB Needham, Detroit	139.7		
DDB Needham Retail, New York	37.7		



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U.S. offices			
Elgin Syferd DDB Needham, Seattle	51.0		
M/V/P/G DDB Needham, Honolulu	31.7		
Asian offices			
DDB Needham, Taipei (MJ)	11.0		
DDB Needham, Sydney (MJ)	183.5		
DDB Needham, Bangkok (MJ)	9.8		
DDB Needham DIK, Hong Kong (MJ)	57.7		
DDB Needham DIK, Singapore (MJ)	7.2		
DDB Needham Japan, Tokyo (MJ)	19.3		
DDB Needham New Zealand, Auckland (MJ)	20.2		
Far East Advertising, Bangkok (MN)	35.9		
Mudra Communications, Ahmedabad (NE)	33.5		
NAGA DDB Needham DIK, Petaling Jaya (MN)	25.1		

European offices			
Admar, Istanbul (NE)	8.3		
Avanti DDB Needham, Oslo (MJ)	21.5		
BMP DDB Needham, London (MJ)	446.0		
Brand Sellers DDB Needham, Helsinki (MN)	16.0		
Carlsson & Brandman DDB Needham, Stockholm (MJ)	60.6		
DDBN, Brussels (MJ)	24.6		
DDBN, Kuesnacht Zurich (MN)	22.0		
DDBN, Copenhagen (MJ)	82.3		
DDBN, Amsterdam (MJ)	510.0		
DDBN, Paris (MJ)	0.5		
DDBN, Prague (MJ)	33.0		
DDBN Heye & Partner, Vienna (MJ)	25.6		
DDBN & Guerrero Publicidade, Lisbon (MJ)	113.9		
Heye & Partner DDB Needham, Munich (MN)	44.2		
Olympic DDB Needham, Athens (MJ)	241.3		
Tandem DDB Needham, Madrid (MJ)	238.3		
Wenzauer DDB Needham, Dueseldorf (MJ)	14.9		
Latin American offices			
DDB Needham, Mexico City (MJ)	5.9		
Ruben Maril DDB Needham, Buenos Aires (NE)	8.6		
Unitors Chile, Santiago (NE)	57.1		

Notes: DDB Needham includes the DDB Needham global network and Diversified Agencies—Rainoldi, Kerzner Radcliffe, Bernard Hodes Group, Kallir, Philips, Ross and half of Rapp Collins Marcoa. DDB Needham's domestic network also includes returns for Milici Valenti Park & Gabriel, Honolulu, and Elgin Syferd, Seattle. DDB Needham added early this year San Francisco agency Goodby, Berlin & Silverstein, which recently opened an office in Los Angeles to service the newly won American Isuzu Motors account. GBS is not included in DDB Needham's total.

Officers: Keith Reinhard, chmn-cco, John Bernbach, pres, Bernard Brochard, pres-intl, John Bradstock, corp exec vp, chmn/mg dir-Australia.

Headquarters: DDB Needham Worldwide/437 Madison Ave./New York, N.Y. 10022/Phone: (212) 415-2000.

Bernard Hodes Group			
Worldwide	1991	1990	% chg
Gross income	\$28.7	\$38.0	-24.4
Volume	\$191.5	\$253.2	-24.4
Employees	404	470	-14.0
Offices	32	31	3.2
U.S.			
1991	1990	% chg	
Gross income	\$23.5	\$30.2	-22.1
Volume	\$156.9	\$201.4	-22.1
Employees	323	384	-15.9
Offices	25	24	4.2

Officers: Bernard S. Hodes, pres-cco, Alan V. Schwartz, exec vp-cco-cfo, Marion J. Starr, exec vp.

Headquarters: Bernard Hodes Group/555 Madison Ave./New York, N.Y. 10022/Phone: (212) 935-4000.

Kallir, Philips, Ross			
Worldwide	1991	1990	% chg
Gross income	\$27.6	\$26.7	3.4
Volume	\$213.9	\$211.7	1.0
Employees	252	264	-4.5
Offices	3	3	0.0
U.S.			
1991	1990	% chg	
Gross income	\$23.5	\$22.2	5.8
Volume	\$186.2	\$181.5	2.6
Employees	210	214	-1.9
Offices	1	1	0.0

European offices

KPR, Brussels (MJ) 11.8

Paling Ellis KPR, London (MJ) 15.9

Officers: John Kallir, chmn, Norman Conner, pres-cco, Michael Boyer, coo, Loredana Belusic, cfo.

Headquarters: Kallir, Philips, Ross/333 E. 38th St./New York, N.Y. 10016/Phone: (212) 856-8400.

Rainoldi Kerzner Radcliffe			
U.S.	1991	1990	% chg
Gross income	\$3.7	\$3.1	18.4
Volume	\$25.0	\$20.6	21.7
Employees	30	29	3.4
Offices	1	2	-50.0

Officer: Joseph C. Rainoldi, pres.

Headquarters: Rainoldi Kerzner Radcliffe/222 Kearny St., 10th Fl./San Francisco, Calif. 94108/Phone: (415) 398-6222.

Rapp Collins Marcoa			
Consolidated returns (\$ in millions)			
Worldwide	1991	1990	% chg
Gross income	\$68.9	\$58.9	17.1
Volume	\$512.3	\$438.9	16.7
Employees	734	601	22.1
Offices	24	24	0.0

U.S.	1991	1990	% chg
Gross income	\$31.3	\$25.5	23.0
Volume	\$260.3	\$208.9	24.6
Employees	384	316	21.5
Offices	4	4	0.0

Notes: Returns for RCM are split between BBDO and DDB Needham because it is a post-Omnicom merger of Rapp & Collins from DDB Needham and Marcoa DR from BBDO.

Officers: G. Steven Dapper, ceo; Robert Mohr, pres; Emily Soell, vice chmn-chief creative officer; Ed McNally, cfo.

Headquarters: Rapp Collins Marcoa/475 Park Ave. South/New York, N.Y. 10016/Phone: (212) 951-7200.

RANK: 50			
Oricom			
Seoul			
Gross income: \$43.8 million			

Organization totals (\$ in millions)			
Worldwide	1991	1990	% chg
Gross income	\$43.8	\$46.2	-5.1
Volume	\$147.9	\$174.0	-15.0
Employees	409	413	-1.0
Offices	1	1	0.0

Notes: Worldwide totals in the tables are all from South Korea.

Officers: Jungsuk Yang, pres; T.Y. Rhee, vp; J.H. Han, exec mg dir; P.S. Min, exec dir.

Headquarters: Oricom/Doosan Bldg/105-7 Nonhyun-Dong Kangnam-Ku/Seoul 135-714, Korea/Phone: 822-510-4010/Fax: 822-542-3966.

RANK: 40			
Orikom Advertising			
Tokyo			
Gross income: \$58.7 million			

Organization totals (\$ in millions)			
Worldwide	1991	1990	% chg
Gross income	\$58.7	\$57.5	2.0
Volume	\$487.6	\$440.0	10.8
Employees	389	367	6.0
Offices	5	5	0.0

Notes: Orikomi worldwide figures in the organization tables are all from Japan. They include the main Tokyo agency and regional shops of the same name in Osaka, Nagoya, Fukuoka and Sapporo, all 100% held. In addition, totals include Senken, Tokyo, Orikomi Service, Tokyo and year-old Orikomi Creative, Tokyo, all 100% held. Equity totals from 83% held Ad Mail, Tokyo, also are included.

Officers: Fusajiro Saito, chmn, Kazuo Watanabe, pres, Kazuo Negishi, exec mg dir, Shoji Hosoya, exec mg dir.

Headquarters: Orikomi Advertising/Ozu Bldg/2-6-3 Nihonbashi-Honcho, Chuo-ku/Tokyo 103, Japan/Phone: 813-3665-4704/Fax: 813-5695-2388.

RANK: 13			
Publicis-FCB Communications			
Paris			
Gross income: \$512.8 million			

Organization totals (\$ in millions)			
Worldwide	1991	1990	% chg
Gross income	\$512.8	\$438.1	17.0
Volume	\$3,433.7	\$2,962.7	15.9
Employees	4,176	4,176	0.0
Offices	111	111	0.0

Publicis Inc.			
U.S.	1991	1990	% chg
Gross income	\$5.8	\$5.5	5.6
Volume	\$48.9	\$44.4	10.2
Employees	45	41	9.8
Offices	1	2	-50.0

European offices			
Arge, Madrid (MJ)	66.9		
Baum, Wang & Zimmermann, Dueseldorf (MJ)	122.0		
Communicar, Lisbon (MJ)	9.0		
Des O'Meara & Partners, Dublin (NE)	17.0		

European offices			
FCB Advertising, London (MJ)	151.0		
FCB Publicidade, Lisbon (MJ)	45.4		
Foot, Cone & Belding, Neuilly (MJ)	183.5		
Gomel/Publicis FCB, Athens (MN)	22.1		
Intermarco/FCB, Stockholm (MJ)	37.3		
LVH, Brussels (MJ)	23.1		
Park Publicidade, Lisbon (MJ)	12.7		
Publicis, London (MJ)	275.4		
Publicis Ciesla, Lisbon (MJ)	49.6		
Publicis Conseil, Paris (MJ)	1,112.8		
Publicis FCB, Oslo (MJ)	57.7		
Publicis FCB, Zurich (MJ)	74.9		
Publicis FCB, Brussels (MJ)	77.0		
Publicis FCB, Madrid (MJ)	48.9		
Publicis FCB, Dueseldorf (MJ)	280.3		
Publicis FCB, Vienna (MJ)	27.6		
Publicis FCB, Milan (MJ)	518.3		
Publicis FCB-Prod, Amsterdam (MJ)	184.6		
Publicis FCB-NSW, Copenhagen (MJ)	13.7		
Yaratim/Publicis FCB, Istanbul (MN)	10.8		

Notes: Publicis-FCB Communications B.V. grew out of the alliance struck in 1989 between Foot, Cone & Belding Communications, Chicago, and Publicis Communications, Paris, that gave Publicis 51% of B.V. and FCB 49%, a total folded into FCB (see FCB profile). B.V. comprises the former European shops of FCB and those of Publicis.

Officers: Maurice Levy, chmn-cco, Antonio Beja, exec deputy chmn, Gerard Pedraglio, pres-cco, Jean-Paul Morin, exec vp, Frederick W. Rhines, ceo-N.Y.

Headquarters: Publicis-FCB Communications/133 Avenue des Champs Elysees/75008 Paris, France/Phone: 331-47-20-67-72/Fax: 331-47-20-29-60.

Publics/1675 Broadway/New York, N.Y. 10019/Phone: (212) 956-8550.

RANK: 48			
Hal Riney & Partners			
San Francisco			
Gross income: \$48.8 million			

Organization totals (\$ in millions)			
Worldwide	1991	1990	% chg
Gross income	\$48.8	\$45.0	8.3
Volume	\$325.0	\$300.0	8.3
Employees	335	310	8.1
Offices	3	3	0.0

U.S. offices

Hal Riney & Partners, Chicago 48.8

Hal Riney & Partners, San Francisco 227.5

Hal Riney & Partners, New York 48.8

Notes: Worldwide figures in the organization table are all from the U.S.

Officers: Hal Riney, chmn-cco, Jim Travis, pres-cco, John Yost, sr vp-gm, Lyn Muegge, exec vp-cfo.

Headquarters: Hal Riney & Partners/735 Battery St./San Francisco, Calif. 94111/Phone: (415) 981-0950.

RANK: 28			
Ross Roy Group			
Bloomfield Hills, Mich.			
Gross income: \$105.1 million			

Organization totals (\$ in millions)			
Worldwide	1991	1990	% chg
Gross income	\$105.1	\$106.0	-0.9
Volume	\$700.5	\$707.0	-0.9
Employees	976	1,038	-6.0
Offices	15	16	-6.3

U.S.			
1991	1990	% chg	
Gross income	\$105.1	\$106.0	-0.9
Volume	\$700.5	\$707.0	-0.9
Employees	883	953	-7.3
Offices	13	14	-7.1

Ross Roy Inc.			
U.S.	1991	1990	% chg
Gross income	\$67.1	\$66.0	1.6
Volume	\$447.0	\$440.0	1.6
Employees	674	742	-9.2
Offices	7	8	-12.5

Notes: Ross Roy Group worldwide figures in the organization table are all from the U.S. During 1991, Group 243, Ann Arbor, Mich., was shut down following the loss of Domino's Pizza. Ross Roy then created Ross Roy Franchise, moving some former Group 243 personnel to this unit's base in Bloomfield Hills, Mich.

Officers: Glen W. Fortinberry, chmn-pres-cco, Chris A. Lawson, exec vp-cfo, Patrick J. Morin, cfo.

Foreign agencies (continued)

Agency, city, equity	Gross income	% chg	1991 Billings
Indonesia			
Exchange rates: 0.000519 0.000550 rupiah -5.6%			
Binamark Indonesia, Jakarta NE	1,005	21.9	6,280
P.T. Mega Dasa Partware Alliance, Jakarta NE	958	0.1	6,304
P.T. Bates Mulia, Jakarta JV	954	-27.1	5,881
Parwanala/DMB&B, Jakarta MN	758	-45.3	4,774
Pratama Advertising, Jakarta NE	296	-8.1	1,972
The Agency/SSA, Jakarta MN	0	NA	0
P.T. Rama Perwira, Jakarta NE	0	NA	0

Notes: Non-equity affiliations—Lintas Indonesia, Ad Force with J. Walter Thompson Co., Pratama with Bozell, P.T. Forum Cahaya Buana with Publicis FCB. The Agency/SSA started in 1991.

Ireland			
Exchange rates: 1.619625 1.640500 pound -1.3%			
Wilson Hartnell Group, Dublin MJ	8,463	2.6	58,362
Arks Alliance, Dublin MJ	4,211	13.6	28,020
BSB Hunter, Dublin MJ	3,401	36.7	15,224
Saatchi & Saatchi Advertising, Dublin MJ	3,160	-32.5	16,178
Des O'Meara & Partners, Dublin NE	2,551	29.6	17,006
CDP Associates, Dublin NE	2,300	-14.8	16,100
Young Advertising, Dublin MJ	1,927	2.2	12,795
DDFH & B Advertising, Dublin MN	1,720	31.3	11,400
Quinn McDonnell Pattison, Dublin NE	1,620	5.0	13,605
Brindley Advertising, Dublin NA	850	NA	5,669
DMB&B Result, Dublin MN	700	-1.3	4,656
McCann-Erickson, Dublin MJ	141	NA	941

Notes: Quinn McDonnell Pattison affiliated with Bozell, DDFH & B Advertising. 20% equity held by J. Walter Thompson Co.; Des O'Meara & Partners affiliated with Publicis FCB. Gross income figures for both years AA estimates.

Israel			
Exchange rates: 0.454375 0.507700 shekel -10.5%			
Arieli Communication Group, Tel Aviv NA	4,998	-10.5	29,080
Gitam Image Promotion, Ramat-Gan NA	3,885	8.5	25,899
Tamir Cohen (Jacobsohn), Tel Aviv NA	3,680	5.1	24,536
Warshevsky Freilich Dover, Tel Aviv NE	2,550	13.7	12,125
Pelled Advertising, Tel Aviv NE	1,704	1.7	11,359
Bing Lital Advertising, Tel Aviv NA	1,268	7.6	6,877

Notes: Gross income for Tamir and Gitam AA estimates. Warshevsky affiliated with Grey. Pelled part of Publicis FCB.

Italy			
Exchange rates: 0.000812 0.000830 lira -2.2%			
Publicis FCB, Milan MJ	77,707	42.2	518,308
Gruppo Armando Testa, Turin MJ	63,764	3.0	490,345
Young & Rubicam Italia, Milan MJ	57,062	1.9	457,658
McCann-Erickson Italiana, Milan MJ	47,756	2.1	318,533
Italia/BBDO, Milan MJ	42,224	12.9	280,140
J. Walter Thompson Italia, Milan MJ	41,852	20.8	307,577
Saatchi & Saatchi Advertising, Milan/Rome MJ	32,046	3.2	300,440
Milano & Grey, Milan MJ	29,661	9.0	222,488
DMB&B, Milan MJ	26,169	0.1	168,565
Lintas/Italy, Milan MJ	25,819	9.0	172,176
Euro RSCG Italia, Milan MJ	23,616	-2.9	224,809
Pirella Goettsche Lowe, Milan/Rome MJ	21,839	8.2	145,592
Livraghi, Ogilvy & Mather, Milan MN	20,751	1.1	143,108
Barbella Gagliardi Saffirio, Turin MJ	17,945	24.3	129,920
Canard, Turin/Milan MJ	17,100	-3.9	168,100
Leo Burnett Co., Milan MJ	17,052	14.1	113,680
TBWA, Milan MJ	16,159	-9.4	143,724
BSB Italia, Milan MJ	12,232	35.6	93,150
B Communications, Milan NE	9,503	30.4	83,636
FCA/Sabbatini Baldoni Panzeri, Milan MJ	9,496	17.4	63,336
Bozelli Testa Pella Rossetti, Milan MJ	8,770	-5.7	71,456
ATA Tonic, Milan MJ	8,023	3.4	53,511
P&T Co., Milan NA	8,010	-22.8	60,872
Alberto Cremona-Alto, Milan NA	7,308	4.5	40,600
Longari & Loman BDDP, Milan MJ	6,861	-9.7	45,768
Ayer Italy, Milan MJ	6,496	8.0	56,840
Conquest Europe Italy, Milan MJ	2,912	-20.9	34,074
GGK Milan, Milan MJ	2,099	-9.7	14,002
STZ, Milan NA	2,030	23.9	13,540
Wirz Italia, Milan MN	488	NA	3,254
Kobs & Draft Italia, Milan MJ	180	50.0	1,200

Foreign agencies (continued)

Agency, city, equity	Gross income	% chg	1991 Billings
Exchange rates: 0.007418 0.006920 yen 7.2%			
Japan			
Leo Burnett-Kyodo Co., Tokyo MJ	35,054	37.8	233,707
J. Walter Thompson Japan, Tokyo MJ	33,600	2.4	223,997
Sanki Sha, Nagoya NA	28,559	19.6	184,115
Standard Advertising, Tokyo NA	22,684	24.9	149,102
Ad Dentsu Tokyo, Tokyo MJ	12,812	2.2	89,796
Hakuhodo-Lintas, Tokyo JV	11,283	11.7	75,248
Grey-Daiko, Tokyo MJ	10,845	-6.8	72,337
Sanyu Agency, Tokyo MJ	10,082	15.4	67,216
Community Ad Hakuhodo, Tokyo MJ	9,805	-3.6	104,902
Cove-ito Advertising, Tokyo NA	8,531	11.4	34,123
BSB Japan, Tokyo MJ	6,566	19.0	51,655
Medicus Intercon K.K., Tokyo/Osaka MJ	5,861	16.8	21,665
Saatchi & Saatchi Advertising, Tokyo MJ	4,959	9.0	30,000
Dentsu, Sudler & Hennessey, Tokyo MJ	4,101	15.9	27,353
DDB Needham Japan, Tokyo MJ	2,889	196.3	19,272
Morioka Hakuhodo, Iwate MJ	2,881	37.5	19,481
Bozell Meitsu, Tokyo MN	2,853	-4.1	16,047
Dai-ichi Communications, Tokyo MJ	2,420	42.0	12,100
Ketchum Advertising (Japan), Tokyo MJ	1,600	-41.1	10,667
Aomori Hakuhodo, Aomori MJ	1,544	44.0	10,049
Fukushima Hakuhodo, Fukushima MJ	1,134	2.5	7,984
Tokyo MS&L, Tokyo MN	683	269.6	4,553

Notes: McCann-Erickson-Hakuhodo includes Cato Design and KK Standard McIntyre, a joint venture with Standard Advertising; Medicus Intercon part of DMB&B; Sanyu Agency majority-owned by Dai-ichi Kikaku; DMB&B holds 25% equity in Tokyo Agency International and 40% in Tokyo MS&L; gross income figures for Sogeti are AA estimates.

Exchange rates: 0.364483 0.369930 ringgit -1.5%			
Malaysia			
Ogilvy & Mather, Kuala Lumpur MJ	5,290	15.1	36,486
McCann-Erickson Malaysia, Kuala Lumpur MJ	3,922	0.1	26,160
Dentsu, Young & Rubicam, Kuala Lumpur MJ	3,827	5.6	25,527
NAGA DDB Needham DIK, Petaling Jaya MN	3,763	211.8	25,096
BSB Malaysia, Kuala Lumpur MJ	3,390	-4.5	20,703
Leo Burnett Co., Kuala Lumpur MN	3,343	5.2	22,286
J. Walter Thompson Co., Kuala Lumpur MJ	2,910	13.6	19,427
Lintas-Malaysia, Kuala Lumpur MJ	2,759	20.2	18,401
AP-Foote, Cone & Belding, Kuala Lumpur MN	2,678	18.5	17,149
Wings BBDO, Petaling Jaya MJ	1,936	-2.6	13,235
Bozell, Petaling Jaya MN	1,864	12.1	12,426
Bali Partnership, Kuala Lumpur MJ	1,660	10.3	11,074
KHK DMB&B, Kuala Lumpur MN	1,474	0.2	9,831
Hakuhodo Malaysia, Kuala Lumpur MN	1,353	24.4	5,836
Grey Malaysia, Kuala Lumpur MN	1,215	13.3	8,105
Saatchi & Saatchi Advertising, Kuala Lumpur MJ	1,004	95.1	4,773
Adextra Alliance, Kuala Lumpur NE	656	38.6	4,374
RA Advertising, Kuala Lumpur NA	559	38.4	5,432

Notes: McCann-Erickson Malaysia includes Mutiara Malaysia and Universal Com-Mal; NAGA DDB Needham DIK is 20% owned by DDB Needham and 10% by Dai-ichi Kikaku.

Exchange rates: 0.000333 0.000356 peso -6.5%			
Mexico			
McCann-Erickson Mexico, Mexico City MJ	16,479	29.6	109,915
J. Walter Thompson de Mexico, Mexico City MJ	9,779	30.0	75,226
Publicidad Ferrer y Asociados, Mexico City NA	9,026	-4.6	60,171
Leo Burnett Co., Mexico City MJ	8,639	36.8	57,599
Bozell, Mexico City MN	6,650	8.8	44,333
SMS de Mexico, Mexico City MJ	6,501	45.7	43,339
Panamericana Ogilvy & Mather, Mexico City MJ	6,371	20.6	42,471
Young & Rubicam, Mexico City MJ	5,180	13.3	38,348
Noble Group, Mexico City MJ	5,049	26.7	33,675
Dieste/BBDO, Mexico City MN	4,683	42.0	31,844
Grey Mexico, Mexico City MJ	3,782	35.6	25,224
Arellano/BSB Publicidad, Mexico City MN	3,615	8.3	24,100
Teran Publicidad, Mexico City NE	3,312	59.0	22,078
FCB de Mexico, Mexico City MJ	3,135	63.4	20,902
Paulino Romero y Asociados, Mexico City NA	2,498	48.5	16,650
DDB Needham, Mexico City MJ	2,236	36.3	14,915
Lintas-Mexico, Mexico City MJ	1,648	39.7	10,990
Saatchi & Saatchi Advertising, Mexico City MJ	0	NA	0

Notes: Teran affiliated with Chate/Day/Mojo; Noble Group majority-owned by DMB&B; Saatchi & Saatchi Advertising opened in 1991; Saatchi formerly was affiliated with Montenegro.

Exchange rates: 0.539242 0.545300 guilder -1.1%			
Netherlands			
BBDO Nederland, Amstelveen MJ	40,307	-1.6	268,715
PMSvW/Young & Rubicam, Amsterdam MJ	34,900	9.3	232,779
Publicis FCB-Prad, Amsterdam MJ	31,279	12.3	184,586
Ogilvy & Mather, Amsterdam MJ	23,241	-0.9	160,285
Lintas-Nederland, Amsterdam MJ	22,787	0.7	151,988
PPG/JWT Group, Amsterdam MJ	21,905	9.0	146,106
ARA/BBDO, Rotterdam MJ	20,119	5.4	134,195
McCann-Erickson Nederland, Amsterdam MJ	13,548	7.4	90,365
Euro RSCG Holland, Amsterdam NA	13,375	-18.0	89,165
DDB Needham, Amsterdam MJ	12,338	27.0	82,294
Grey, Amsterdam MJ	11,378	-15.9	75,891
Neorderviel & Winninghoff/Leo Burnett, Amsterdam MJ	11,324	6.4	75,498
Saatchi & Saatchi Advertising, Amstelveen MJ	11,324	-4.5	78,729
TBWA, Amsterdam MJ	10,246	-17.0	68,484
DMB&B, Amsterdam MJ	6,866	3.8	45,772
Lowe Kalper & Schouten, Amsterdam MJ	6,811	21.0	45,404
MORE Adviesbureau, Deventer NE	6,363	19.1	44,541
BSB Amsterdam, Amsterdam MJ	6,142	30.0	40,967
ARVH Reklame & Marketing, Zaandam MJ	5,932	3.6	39,904
BWH, Rotterdam NA	5,285	5.3	35,051

Gross income and billings are U.S. \$ in thousands.

pres-Ross Roy Advertising; Richard C. Ward, pres-Ross Roy Communications.
Headquarters: Ross Roy Group/100 Bloomfield Hills Parkway/Bloomfield Hills, Mich. 48304/Phone: (313) 433-6000.

Calef, Hirsch & Spector			
U.S.	1991	1990	% chg
Gross income	\$16.8	\$15.4	9.1
Volume	\$112.0	\$102.7	9.1
Employees	80	80	0.0
Offices	2	2	0.0

Officer: Ricardo Calvillo, pres.
Headquarters: Calef, Hirsch & Spector/250 Park Ave. South/New York, N.Y. 10003/Phone: (212) 777-0666.

Griswold			
U.S.	1991	1990	% chg
Gross income	\$7.8	\$7.7	2.0
Volume	\$52.0	\$51.0	2.0
Employees	100	100	0.0
Offices	2	2	0.0

Officer: Jeffrey Weber, exec vp-gm.
Headquarters: Griswold/101 Prospect Ave. West/Cleveland, Ohio 44115/Phone: (216) 696-3400.

Consolidation note
Agencies are shown by 100% of their returns in profiles of the World's Top 50 Agency Organizations. However, only their equity portion is included in the parent organization's totals comprising the ranking.

RANK: 3

Saatchi & Saatchi Co.

New York/London
Gross income: \$1,705.5 million

Organization totals (\$ in millions)

Worldwide	1991	1990	% chg
Gross income	\$1,705.5	\$1,700.5	0.3
Volume	\$11,663.4	\$11,637.4	0.2
Employees	12,970	14,877	-12.8
Offices	429	429	0.0
U.S.	1991	1990	% chg
Gross income	\$698.9	\$683.8	2.2
Volume	\$4,879.9	\$4,773.1	2.2
Employees	5,299	5,151	2.9
Offices	85	85	0.0

Asian office
BSB/S&S Advertising, Guangzhou/Beijing(JV)
European offices
BSB/S&S Advertising, Budapest(JV)
BSB/S&S Creative Comm., Prague(JV)
BSB/S&S Marce, Warsaw(JV)
BSB/S&S Studio Mktg., Belgrade(JV)
Notes: Saatchi & Saatchi Co. consists of two

networks, Saatchi & Saatchi Advertising Worldwide and Backer Spielvogel Bates Worldwide, and agency Campbell-Mithun-Estly. The holding company totals for both years also include returns from marketing services operations of \$123.7 million gross income on \$824.5 million in billings in 1991, both down 15.7%. These numbers are included in non-U.S. S&S Co. figures only. Non-advertising businesses include Rowland Worldwide, a public relations company, Siegel & Gale, a design business, Litigation Sciences Inc., and a number of market research companies. Agencies identified as BSB/S&S shops (immediately below organization totals) are joint ventures of the two S&S Co. networks. Returns from these shops were split between Backer Spielvogel Bates Worldwide and Saatchi & Saatchi Advertising Worldwide.
Officers: Maurice Saatchi, chmn; Robert Louis-Dreyfus, ceo; Charles Scott, ceo; Charles Saatchi, dir.
Headquarters: Saatchi & Saatchi Co./83-89 Whitefield St./London W1A 4XA, England/Phone: 4471-436-4000/Fax: 4471-436-1998.

Saatchi & Saatchi Advertising Worldwide

Consolidated returns (\$ in millions)			
Worldwide	1991	1990	% chg
Gross income	\$829.2	\$814.6	1.8
Volume	\$5,965.7	\$5,566.0	1.8
Employees	4,514	6,306	-28.4
Offices	NA	NA	NA

Germany's Business and Financial Daily



There are numerous daily newspapers in Germany, but only one concentrating on business and finance - an important fact to be aware of, if you want to do business with German companies. 81% of Handelsblatt readers are entrepreneurs, board members, managing directors or other senior executives (source: LAF '91).

A commitment to editorial excellence provides readers with in-depth news and information on business, finance and trade developments in Germany and abroad.

Important Business Reading: Germany
Handelsblatt 39%
FAZ 37%
Süddeutsche Zeitung 6%
Die Welt 4%
Börsen-Zeitung 4%

Source: European Business Readership Survey 1991

Daily topics include "Economics and Politics", "Money and Credit", the "World Economy", "Companies and Branches of Industry" and the "Financial Section". News is interpreted from both a national and international point of view.

The "European Business Readership Survey 1991" shows Handelsblatt to be No. 1 in the category "Important Business Reading" in Germany - in front of all other German or English-language publications.

For information about advertising in Handelsblatt, please contact:

NEW YORK: HANDELSBLATT, Inc.
Mr. Guy Holroyd, 415 Madison Avenue,
14th floor, New York, NY 10017,
Tel: 212-754 08 50, Fax: 212-688 12 16

U.S.	1991	1990	% chg
Gross income	\$371.6	\$350.5	6.0
Volume	\$2,566.1	\$2,420.5	6.0
Employees	2,135	2,135	0.0
Offices	16	15	6.7
Africa & Middle East offices			
Barker McCormac, Harare (NE)			7.6
Gilbert/Hickey, Lusaka (NE)			1.5
Horizon Advertising, Gaborone (NE)			0.7
Klerck & Barrett, Johannesburg-Cape Town (NE)			31.5
MCL, Nairobi (NE)			1.9
MCSA, Lagos (NE)			4.4
Saatchi & Saatchi Advertising, Jeddah (MJ)			7.8
Saatchi & Saatchi Advertising, Cairo (MJ)			1.0
Saatchi & Saatchi/SDA, Beirut (NE)			NA
Asian offices			
Ace/Saatchi & Saatchi Advertising, Manila (MN)			19.3
Everest Advertising, Bombay-New Delhi (NE)			19.3
IAL, Karachi (NE)			5.8
Saatchi & Saatchi, Taipei (MJ)			20.9
Saatchi & Saatchi, Sydney-Melbourne (MJ)			110.1
Saatchi & Saatchi, Singapore (MJ)			30.3
Saatchi & Saatchi, Bangkok (MJ)			11.5
Saatchi & Saatchi, Tokyo (MJ)			30.0
Saatchi & Saatchi, Kuala Lumpur (MJ)			4.8
Saatchi & Saatchi, Wellington-Auckland (MJ)			68.2
Saatchi & Saatchi, Hong Kong (MJ)			30.9
Saatchi & Saatchi/IMC, Seoul (JV)			0.5
The Agency SSA, Jakarta (MN)			NA
European offices			
Adel SSA, Athens (JV)			27.2
Guzzi Santalier S&S, Istanbul (NE)			51.4
Impuls, Zurich (NE)			41.2
Interplan, Helsinki (NE)			21.9
KHBB, London (MJ)			221.8
RTS Rieger, Stuttgart (E)			38.8
Saatchi & Saatchi, Brussels (MJ)			35.3
Saatchi & Saatchi, Dublin (MJ)			16.2
Saatchi & Saatchi, Milan-Rome (MJ)			300.4
Saatchi & Saatchi, Stockholm (MJ)			14.4
Saatchi & Saatchi, Lisbon (MJ)			5.0
Saatchi & Saatchi, Amsterdam (MJ)			78.7
Saatchi & Saatchi, Frankfurt (MJ)			201.7
Saatchi & Saatchi, Oslo (MJ)			10.5
Saatchi & Saatchi, Paris (MJ)			286.7
Saatchi & Saatchi, London (MJ)			1,187.5
Saatchi & Saatchi, Madrid-Barcelona (MJ)			117.2
Saatchi & Saatchi, Vienna (MJ)			64.7
Saatchi & Saatchi, Copenhagen (MJ)			15.7
Saatchi & Saatchi Direct, Athens (JV)			4.7
SSBC, Stockholm (MJ)			16.1
SSBC, Nyon-Zurich (MJ)			22.5
Latin American offices			
Advertising Associates Compton SSA, Hamilton (NE)			3.5
AW SSA, Caracas (MN)			18.4
Badillo SSA, San Juan (MJ)			73.6
Better Comunicacao, Sao Paulo (NE)			46.1
CGR Communications, Kingston (NE)			1.6
Cumbre SSA, Santo Domingo (NE)			2.2
GM SSA, San Jose (NE)			1.2
Israel & De Bianchi, Santiago (NE)			9.4
Laurel SSA, Buenos Aires (NE)			22.5
Lensdale SSA, Port of Spain (NE)			9.1
Lensdale SSA, St. Michaels, Barbados (NE)			3.6
MHG Publicidad, Lima (NE)			3.7
Propaganda Sanchez, Bogota (NE)			14.6
Publicitas SSA, Guayaquil (NE)			2.9
Saatchi & Saatchi Advertising, Mexico City (MJ)			NA
Canadian office			
Saatchi & Saatchi Advertising, Toronto (MJ)			79.3

Notes: S&S/SAW is a consolidation of the worldwide agency network of the same name and U.S. agencies Cadwell Davis Partners, Conill Advertising, Cliff Freeman & Partners, Klemmer Advertising, Rumrill-Hoyt and Team One Advertising.

Officers: Ed Wax, chmn.-cso, Bob Kennedy, pres.-coo, Dick O'Brien, vice chmn.-dir. worldwide acct. svcs., Jeremy Sinclair, co-chmn., exec. creative dir.

Headquarters: Saatchi & Saatchi Advertising
Worldwide/375 Hudson St./New York, N.Y. 10014/Phone: (212) 463-2000

Cadwell Davis Partners			
U.S.	1991	1990	% chg
Gross income	\$15.1	\$15.2	-0.6
Volume	\$100.4	\$101.0	-0.6
Employees	17	17	0.0
Offices	1	1	0.0

Officer: Herm Davis, chmn.
Headquarters: Cadwell Davis Partners/375 Hudson St./New York, N.Y. 10014/Phone: (212) 463-2100

Conill Advertising			
U.S.	1991	1990	% chg
Gross income	\$4.3	\$4.1	5.5
Volume	\$28.0	\$26.0	7.7
Employees	46	55	-16.4
Offices	2	2	0.0

U.S. offices:
Conill Advertising, Los Angeles
Conill Advertising, New York
Officer: Carlos Rossi, ceo
Headquarters: Conill Advertising/100 Avenue of the Americas/New York, N.Y. 10013/Phone: (212) 274-7500

Cliff Freeman & Partners			
U.S.	1991	1990	% chg
Gross income	\$12.1	\$11.9	2.3
Volume	\$80.8	\$79.0	2.3
Employees	24	30	-20.0
Offices	2	2	0.0

Officer: Cliff Freeman, chmn.
Headquarters: Cliff Freeman & Partners/375 Hudson St./New York, N.Y. 10014/Phone: (212) 463-3200

Klemmer Advertising			
U.S.	1991	1990	% chg
Gross income	\$25.5	\$17.6	44.9
Volume	\$155.1	\$134.4	22.8
Employees	160	140	14.3
Offices	1	1	0.0

Officers: Albert P. Molinaro Jr., chmn. emeritus, Gavin A. Scott, pres.-coo
Headquarters: Klemmer Advertising/375 Hudson St./New York, N.Y. 10014/Phone: (212) 463-4000

Rumrill-Hoyt			
U.S.	1991	1990	% chg
Gross income	\$14.9	\$13.4	11.5
Volume	\$99.4	\$89.1	11.5
Employees	181	174	4.0
Offices	1	1	0.0

Foreign agencies (continued)

Agency, city, equity	Gross income	% chg	1991 Billings
Netherlands Exchange rates: 0.539242 0.545300 guilder -1.1%			
GGK Amsterdam, Amsterdam MJ	4,914	10.9	32,774
Campaign Company, Amsterdam NE	4,400	10.0	29,300
Hakuhodo Nederland, Amsterdam MJ	4,385	7.3	33,560
Blend Marketing Communications, The Hague NA	4,314	-6.9	26,742
VVH FCA, Amsterdam MJ	4,085	6.3	27,232
Kaspers, Koetse, Burger & de Roos/SMS Amsterdam MJ	3,397	32.1	22,645
Bozell Advertising, Amstelveen MJ	2,905	-3.3	19,364
Ayer Nederland, Deventer MJ	2,666	-2.0	17,984
Flem Reclamebureau, Gouda NA	2,265	4.6	15,107
Conquest Europe Netherlands, Amsterdam MJ	173	40.0	7,505
Kobs & Draft, Amsterdam MJ	315	61.5	2,100

Notes: Young & Rubicam includes Wunderman, Cato Johnson and Burson-Marsteller. Lintas Nederland includes Data Gold, Lintas Direct, Initiative Media, Strating Promotion and Via Reklame. McCann-Erickson Nederland includes Universal Media, BBDO Nederland includes PHV BBDO, BBDO Direct, BBDO PR, Business-to-Business, Business Communications, Liberty Films, Media Direction, Signum, Keja/Doma and Bartels/Verdonk Impuls. For 1991 Bartels/Verdonk Impuls recorded \$4,547,428 gross income, last year Publicis FCB acquired from the Alliance International Group the Overad Group of agencies—Prad, Amsterdam, HVR, The Hague, and L.V.H. Brussels. The new network keeps the Overad name.

New Zealand Exchange rates: 0.582583 0.596880 NZ dollar -2.4%			
Saatchi & Saatchi Advertising Wellington/Auckland MJ	13,632	12.0	68,162
Colenso Communications, Auckland MJ	12,972	24.8	59,030
Footle, Cone & Belding, Wellington MJ	8,214	-8.3	48,937
Ogilvy & Mather, Wellington MJ	6,145	-2.2	42,376
Mattingsly & Partners, Auckland MJ	5,025	9.9	33,515
HKM Advertising, Auckland MJ	4,695	-21.9	23,475
McCann-Erickson New Zealand, Auckland MJ	3,648	10.9	24,332
J. Walter Thompson NZ, Wellington MJ	3,358	-20.9	16,870
DOB Needham New Zealand, Auckland MJ	3,034	-23.3	20,237
DM&B, Auckland MJ	2,796	34.6	13,982
C/D/M Inc., Auckland MJ	2,700	17.4	17,000
Lintas:New Zealand, Auckland MJ	2,668	0.5	17,793
BSB New Zealand, Auckland MJ	2,513	-23.9	12,566
Young & Rubicam New Zealand, Auckland MJ	2,103	-2.2	14,512
Bianshard Somerville Woodroffe, Auckland NA	1,931	29.4	9,656
Leo Burnett-New Zealand, Wellington MJ	1,232	-7.1	6,161
Grey Advertising NZ, Auckland MJ	888	-4.8	5,926

Notes: Ayer closed its Auckland office in 1991. Colenso Communications and HKM Advertising part of Clemenger BBDO NZ, Mattingsly & Partners majority-owned by DY&R.

Norway Exchange rates: 0.15548 0.158650 kroner -2.0%			
BSB Bates Gruppen, Oslo MJ	24,655	13.2	164,352
Scaneco-Young & Rubicam, Oslo MJ	10,118	-19.8	96,129
Publicis FCB, Oslo MJ	8,644	23.5	57,656
Nordskar & Thorkildsen Leo Burnett, Oslo MN	6,492	17.8	43,284
ScanPartner Norge, Oslo NA	6,477	6.3	63,264
Myers/Lintas Norway, Oslo NE	6,029	7.8	40,212
DM&B/Lund & Lommer, Oslo MJ	6,017	6.4	40,134
Ogilvy & Mather, Oslo MJ	5,155	-3.2	43,368
Reklamens Hus McCann, Oslo MJ	4,480	7.3	29,882
Avanti DOB Needham, Oslo MJ	3,219	12.7	21,473
Jenssen & Borkenhagen/BBDO, Oslo MN	3,032	-6.3	41,514
Euro RSCG Norway, Oslo MN	2,239	-23.7	16,583
Jensen Grey, Oslo MN	2,122	2.9	14,156
Schjaerven/J. Walter Thompson, Oslo NE	1,821	2.2	12,149
Bj. Kvernland, Oslo NA	1,679	NA	9,329
Saatchi & Saatchi Advertising, Oslo MJ	1,570	30.1	10,522
Kobs & Draft, Oslo MJ	1,245	45.6	8,300
Jenssen & Borkenhagen 3, Oslo MJ	840	-24.4	8,272

Notes: Scaneco-Young & Rubicam includes Burson-Marsteller, gross income for both years for Bj. Kvernland AA estimates, BSB Bates Gruppen includes Bates Advertising, Baker & Spielvogel, Bergen, Kvernlander, Trillemarketing, AV Kontakt, Finstad, Guro Media, Bates Gruppen and Benjamin.

Pakistan Exchange rates: 0.042925 0.046540 rupee -7.8%			
Interflow Communications, Karachi NE	1,610	15.3	10,731
International Advertising, Karachi NE	872	37.0	5,795
R.Lintas, Karachi NE	854	5.5	5,699
Orient Advertising, Karachi NA	837	-2.6	5,578
Asiatic Advertising, Karachi NE	596	-15.9	3,975
Blazon Advertising, Karachi NE	450	13.1	2,999
Prestige Communications, Karachi NA	386	13.0	2,576
G.H. Thaver & Co., Karachi NA	136	-25.7	977

Notes: Non-equity affiliations—Asiatic Advertising with J. Walter Thompson Co., IAL with Saatchi & Saatchi Advertising, Interflow Communications with Ogilvy & Mather, Blazon Advertising with Grey.

Panama Exchange rates: 1.000000 1.000000 U.S. dollar 0.0%			
Publites/FCB, Panama City NE	1,200	27.0	5,600
Campaign Publicidad, Panama City NE	980	40.4	4,100
Conte/McCann-Erickson, Panama City MJ	849	27.5	5,663
APCU de Panama, Panama City NE	607	15.2	4,000
Modernoble Mega Publicidad, Panama City NA	517	90.7	2,300
Siegrist Publicidad, Panama City NA	340	21.4	1,720

Notes: Campaign Publicidad has affiliations with Grey, Bozell and BBDO Worldwide, Modernoble Mega Publicidad affiliated with Ogilvy & Mather.

Philippines Exchange rates: 0.036883 0.042810 peso -13.8%			
McCann-Erickson Philippines, Manila MJ	3,779	-7.4	25,206
Basie/Footle, Cone & Belding, Manila MN	3,773	12.1	25,154
J. Walter Thompson Co., Manila MJ	3,176	11.0	22,001
Ace/Saatchi & Saatchi Advertising, Manila MN	2,899	4.9	19,327
Lintas:Manila, Manila MN	2,270	21.6	15,139
Hemisphre-Leo Burnett Co., Manila MJ	1,829	3.8	12,196
Dentsu, Young & Rubicam-Alcantara, Manila MN	1,656	-0.7	11,044

Gross income and billings are U.S. \$ in thousands

Foreign agencies (continued)

Agency, city, equity	Gross income	% chg	1991 Billings
Philippines Exchange rates: 0.036883 0.042810 peso -13.8%			
PAC/BBDO, Manila MN	1,387	-20.4	9,682
Aspac & Grey, Manila MN	921	16.3	6,142
Jimenez DMB&B, Manila MN	479	212.3	3,246
Admakers, Manila NA	424	-19.8	2,824
Atlas Bozell Advertising, Manila NE	249	4.8	1,661
Care Group/Alliance, Manila NE	210	23.5	1,430
Prime Advertising Systems, Manila NA	144	6.7	959
Communication Concepts, Manila NA	71	15.8	508
Ogilvy & Mather, Manila MN	52	NA	443

Notes: Ogilvy & Mather dissolved its association with Olbes in 1991.

Poland Exchange rates: 0.000182 NA zloty NA			
BSB/S&S Marco, Warsaw JV	616	NA	4,109
Grey, Warsaw MJ	294	NA	1,961
ITI McCann-Erickson, Warsaw MJ	266	NA	1,776
GGK Warsaw, Warsaw MN	164	NA	1,092
Buro Reklam, Warsaw NE	75	NA	500
DM&B, Warsaw MJ	28	NA	187
Young & Rubicam Poland, Warsaw NA	0	NA	1

Notes: Buro Reklam affiliated with Bozell.

Portugal Exchange rates: 0.006967 0.006980 escudo -0.2%			
McCann-Erickson/Hora, Lisbon MJ	15,397	17.3	102,698
J. Walter Thompson Publicidade, Lisbon MJ	8,327	23.3	55,541
Publicis Ciesla, Lisbon MJ	7,440	-0.4	49,624
FCB Publicidade, Lisbon MJ	6,812	8.4	45,434
Lintas:Portugal, Lisbon MJ	6,767	14.9	45,139
Ogilvy & Mather, Lisbon MJ	6,520	20.5	44,968
Team/Young & Rubicam, Lisbon MJ	5,986	18.0	39,934
Euro RSCG Portugal, Lisbon MJ	4,522	82.5	25,030
DOB Needham & Guerreiro Publicidade, Lisbon MJ	3,832	16.4	25,558
BSB Portugal, Lisbon MJ	3,380	14.6	22,536
Bozell Portugal, Lisbon MJ	2,939	49.3	12,449
Timing-Alliance, Lisbon MJ	2,856	45.0	19,020
Cineponto/Leo Burnett, Lisbon MN	2,580	6.2	17,203
Markimage, Lisbon NA	2,313	102.1	23,918
Antena/BBDO, Lisbon MJ	2,261	8.0	15,584
Park Publicidade, Lisbon MJ	1,903	34.0	12,696
Communicar, Lisbon MJ	1,347	75.4	8,984
Neovox Publicidade, Lisbon NE	1,310	2.6	8,741
Latina, Lisbon NA	1,134	-2.2	4,007
Saatchi & Saatchi Advertising, Lisbon MJ	944	611.7	5,000
DM&B, Lisbon MJ	907	27.7	6,051
Ayer Portugal, Lisbon MN	662	26.4	4,415
Barro Lisbon, Lisbon MN	600	200.0	4,000
FCA Caixa Alta, Lisbon MN	538	28.8	3,584

Notes: Team/Young & Rubicam includes Wunderman and Cato Johnson. Antena/BBDO consolidated in 1991 Antena/BBDO and Smash figures. For 1990, only Antena/BBDO figures are given. McCann-Erickson/Hora also includes Jotame, Canal Um, McCann Direct and Universal Media. Neovox Publicidade affiliated with Grey, Park Publicidade and Communicar majority-owned by Publicis FCB. Barro Lisbon 36% owned by CDP Europe.

Puerto Rico				Exchange rates: 1.000000 1.000000 U.S. dollar 0.0%			
Badillo/SSA, San Juan	MJ	11,038	-10.3	73,590			
Marti, Flores, Prieto & Wachtel, San Juan	MN	8,200	-3.1	54,700			
West Indies & Grey, San Juan	MJ	6,385	-3.6	42,588			
Footle, Cone & Belding, Isla Verde	MJ	5,089	19.0	33,944			
Young & Rubicam Puerto Rico, Guaynabo	MJ	4,784	-11.1	31,908			
BBDO Puerto Rico, Hato Rey	MJ	4,773	4.3	27,043			
Leo Burnett Co., San Juan	MJ	4,050	7.8	27,001			
McCann-Erickson, San Juan	MJ	3,098	-13.2	20,864			
de la Cruz & Associates, Hato Rey	MN	2,637	-7.3	17,577			
Bozell CPV Advertising, Santurce	MJ	438	-39.0	2,922			

Foreign agencies (continued)

Agency, city, equity	Gross income	% chg	1991 Billings
Exchange rates: 0.577475 0.547410 Singapore dollar 5.5%			
Singapore			
Ball Partnership, Singapore MJ	2,368	20.1	15,592
Lintas:Singapore, Singapore MJ	2,038	20.0	13,597
DDK Bozell, Singapore MJ	1,764	4.4	11,753
Ketchum Advertising/Singapore, Singapore MJ	1,500	14.6	10,000
C/D/M Inc., Singapore MJ	1,400	-36.4	9,000
BSB Singapore, Singapore MJ	1,239	13.1	7,423
DMB&B Tokyo/Singapore, Singapore MJ	1,157	-33.0	7,142
DDB Needham DIK, Singapore MJ	1,086	69.5	7,242
Tropical Alliance, Singapore MJ	722	9.9	4,793
Gartshore & Associates, Singapore NA	611	25.3	4,077
Notes: Returns for Batey Communications, headquartered in Singapore, include offices in Hong Kong, Taiwan, Malaysia and Philippines. Paris-based BDDP holds 20% equity in Batey.			
South Africa Exchange rates: 0.366642 0.387510 rand -5.4%			
Ogilvy & Mather Rightford, Cape Town MN	19,406	31.7	133,835
Young & Rubicam South Africa, Johannesburg MJ	13,415	9.3	89,475
Lindsay Smithers-FCB, Sandton NE	12,686	-5.5	76,876
Grey Holdings, Johannesburg MN	11,121	-18.5	74,177
BSB/Bates, Sandton NE	10,633	-4.4	65,996
Lintas:South Africa, Sandton MN	6,995	0.9	46,655
McCann Group, Johannesburg MJ	5,872	9.3	39,166
Klerck & Barrett, Johannesburg/Cape Town NE	5,196	3.3	31,492
J. Walter Thompson Co., Sandton MN	3,637	-9.5	22,040
Barker McCormac Advertising, Johannesburg NA	3,061	-0.9	18,551
IMA Pty., Cape Town NA	2,331	13.2	14,125
Louis Wilsenach Group, Johannesburg NE	1,968	23.9	11,929
Notes: Klerck & Barrett affiliated with Saatchi & Saatchi Advertising. Lwin: Wilsenach Group affiliated with Bozell.			
South Korea Exchange rates: 0.001370 0.001420 won -3.5%			
Cheil Communications, Seoul NA	101,615	39.1	315,844
Oricom, Seoul NA	43,793	-5.1	147,933
Daehong Advertising, Seoul NE	41,353	1.3	187,453
Korad Ogilvy & Mather, Seoul MN	28,770	6.1	191,800
Diamond Ad, Seoul MN	12,660	10.1	112,540
Seoul DMB&B, Seoul MN	5,951	0.8	48,812
Cheil Bozell, Seoul MN	5,247	111.2	20,253
Geoson Advertising, Seoul NE	4,781	-53.4	36,500
McCann-Erickson, Seoul MJ	3,122	166.6	20,824
J. Walter Thompson Korea, Seoul MJ	1,507	73.4	10,054
Dentsu, Young & Rubicam Korea, Seoul MN	1,295	-2.0	9,727
Leo Burnett Sonyon, Seoul NE	1,064	NA	7,095
Lintas:Samhee, Seoul NE	141	36.5	938
Saatchi & Saatchi/IMC, Seoul JV	72	5.5	480
Notes: Daehong Advertising affiliated with DDB Needham and Dai-ichi Kikaku; Diamond Ad is 10% owned by Backer Sportswear; Bates: Geoson Advertising affiliated with Grey.			
Spain Exchange rates: 0.009729 0.009740 peseta -0.1%			
Grupo BSB, Madrid MJ	53,879	2.8	359,360
Bassat, Ogilvy & Mather, Madrid MJ	44,615	15.5	301,453
TAPSA/N W Ayer, Madrid MJ	39,889	6.7	291,724
BDDO/Espana, Barcelona MJ	36,591	12.9	259,638
Tandem DDB Needham, Madrid MJ	36,172	24.9	241,270
McCann-Erickson Group, Madrid MJ	34,727	-4.8	231,629
J. Walter Thompson Co., Madrid MJ	33,926	-7.5	289,057
Young & Rubicam, Madrid MJ	30,014	5.2	200,196
Lintas:Spain, Madrid MJ	28,808	-5.9	192,148
Euro RSCG Spain, Madrid MJ	26,541	-17.3	190,087
Ruiz Nicolli Group, Madrid MJ	18,575	29.7	122,868
Contrapunto, Madrid MN	18,193	20.4	121,291
Saatchi & Saatchi Advertising, Madrid/Barcelona MJ	16,948	-12.6	117,196
DMB&B, Madrid MJ	16,867	7.0	113,182
Grey Espana, Madrid/Barcelona MJ	16,072	60.7	107,202
Slogan, Barcelona NA	14,107	31.7	82,697
Publicidad Noventa y Seis, Madrid NA	12,648	-16.8	84,350
Solucion BDDP, Madrid MJ	12,025	63.6	80,206
CID FCA, Madrid MN	11,490	6.1	87,804
Lowe Espana, Barcelona/Madrid MJ	10,945	-8.6	72,968
Arge, Madrid MJ	10,051	-8.3	66,942
Vitruvio/Leo Burnett, Madrid MN	9,572	8.9	63,820
Ricardo Perez Asociados, Madrid NA	9,243	5.4	68,103
TBWA, Madrid MJ	8,659	38.9	57,693
MMLB, Barcelona NA	8,075	-7.4	58,374
BCK Alliance, Barcelona MN	8,026	-1.3	53,510
Barro CDP Europe, Madrid/Barcelona MJ	7,400	-7.5	59,200
Publicis FCB, Madrid MJ	7,336	32.6	48,932
SCACS de Publicidad, Barcelona NA	5,497	4.5	33,079
Rileva Zamorana Rodriguez/SMS, Madrid MJ	5,235	-5.1	40,180
Dayax Testa International, Barcelona MN	3,900	23.2	30,000
Kobs & Draft, Madrid MJ	3,015	25.6	20,100
Bozell International, Madrid MJ	2,125	-1.0	12,617
GGK Madrid, Madrid MJ	1,445	-58.8	10,357
Conquest Europe Spain, Madrid MJ	1,438	-2.8	15,232
Medicus Intercon, Barcelona/Madrid MJ	785	268.1	5,836
Notes: Contrapunto 30% owned by BDDO Worldwide; McCann-Erickson includes Universal Media and Clarin Publicidad; GGK closed its Barcelona office in 1991; Grupo BSB includes BSB Publicidad (11 offices); BSB Delvico (3); BSB Central Media (3) and BSB Especializadas (4); Medicus Intercon part of DMB&B; Ruiz Nicolli part of Euro RSCG; Young & Rubicam includes Wunderman, Cato Johnson and Burson-Marsteller; Arge majority-owned by Publicis FCB.			
Sweden Exchange rates: 0.165950 0.168070 kroner -1.3%			
Hall & Cederquist/Y&R, Stockholm MJ	16,529	-21.1	102,299
McCann-Erickson Sweden, Stockholm MJ	15,867	107.8	105,833
Grey Communications, Stockholm MJ	14,106	-23.7	94,085
Gross income and billings are U.S. \$ in thousands.			

Top 20 U.S. cities by billings

Rank	Market	Total local shop billings			Reported shops	Top office in market by local billings	Billings
		1991	1990	% chg			
1	New York	\$24,145.9	\$23,402.2	3.2	185	Grey Advertising	\$1,560.7
2	Chicago	7,128.7	7,021.8	1.5	65	Leo Burnett Co.	2,040.3
3	Los Angeles	3,949.5	4,081.6	-3.2	46	Chiat/Day/Mojo (Venice, Calif.)	422.0
4	Detroit	3,635.5	3,648.8	-0.4	30	J. Walter Thompson USA	482.0
5	San Francisco	1,853.9	1,658.6	11.8	27	Foot, Cone & Belding	438.0
6	Dallas	1,314.4	1,178.3	11.6	17	Bozell	350.0
7	Minneapolis	1,211.1	1,100.0	10.1	16	Campbell-Mithun-Esty	399.0
8	Atlanta	937.2	895.8	4.6	22	BDDO Worldwide	249.6
9	Boston	931.5	810.2	15.0	16	Hill, Holliday, Connors, Cosmopolis	357.3
10	Philadelphia	919.5	936.4	-1.8	23	FCB/LGK	115.0
11	St. Louis	721.1	645.2	11.8	9	D'Arcy Masius Benton & Bowles	401.0
12	Cleveland	685.5	726.9	-5.7	11	Nationwide Advertising Service	169.9
13	Houston	478.9	437.2	9.5	11	Ogilvy & Mather	130.0
14	Kansas City	363.9	342.3	6.3	9	Bernstein-Rein	129.1
15	Seattle	320.0	296.8	7.8	8	Cole & Weber	76.7
16	Baltimore	316.7	299.2	5.9	6	Gray Kirk/VanSant	75.5
17	Pittsburgh	304.5	299.0	1.8	7	Ketchum Communications	90.4
18	Milwaukee	284.1	265.1	7.1	11	Frankenberry, Laughlin & Constable	68.4
19	Washington	264.8	285.9	-7.4	8	Earle Palmer Brown Cos. (Bethesda, Md.)	170.7
20	Portland, Ore.	253.1	180.3	40.4	7	Wieden & Kennedy	165.0

Top 10 non-U.S. cities by billings

Rank	Market	Total local billings			Reported shops	Rank	Market	Total local billings			Reported shops
		1991	1990	% chg				1991	1990	% chg	
1	Tokyo	\$24,501.2	\$22,599.5	8.4	36	6	Frankfurt	\$2,741.5	\$2,536.6	8.1	18
2	London	12,074.5	11,677.0	3.4	62	7	Sydney	2,417.7	2,551.8	-5.3	29
3	Paris	9,718.9	10,112.9	-7.0	49	8	Duesseldorf	2,383.3	2,254.4	5.7	15
4	Milan	4,013.1	3,795.9	5.7	28	9	Toronto	2,318.0	2,144.6	8.1	28
5	Madrid	3,491.8	3,326.4	5.0	27	10	Amsterdam	2,041.8	2,013.2	1.4	25

Notes: Billings are in millions of U.S. dollars. Figures for 1990 reflect billings reported by agencies in 1991. Totals are based on reporting from 722 offices of 532 U.S. agencies and 1,110 non-U.S. agencies.

Tampa Bay's winning numbers.

345,600

Daily readers between the ages of 25-54

108,500

Daily readers employed with \$50,000+ household income

428,400

Sunday readers between the ages of 25-54

128,200

Sunday readers employed with \$50,000+ household income

In Florida, the Tampa Bay market ranks first in population, households, retail and food store sales and the advertising vehicle that's number one in reaching adults in prime buying ages and incomes is The Tampa Tribune.

Tampa Bay's next closest newspaper comes up short in all of these categories every day of the week. Which is why, as far as advertisers are concerned, nothing beats The Tampa Tribune.

To advertise, call Joe Gess, General Advertising Manager at (813) 272-7447. Represented nationally by Sawyer Ferguson Walker, Co.

The Tampa Tribune

Media General

Sources: 1991 Scarborough Study, S & M 1991 Survey of Buying Power

Top 10 agencies by U.S. media billings

Agencies ranked in 14 media categories by 1991 volume

Rank	Agency	1991	Media billings 1990	% chg	Total billings 1991	Media % total billings 1991
Newspaper						
1	Nationwide Advertising Service	\$142.7	\$180.3	-20.8	\$169.9	84.0
2	DDB Needham Worldwide	116.7	101.1	15.4	1,688.7	6.9
3	BBD0 Worldwide	115.5	87.9	31.3	1,554.0	7.4
4	Bernard Hodes Group	112.2	147.7	-24.0	156.9	71.5
5	Saatchi & Saatchi Advertising Worldwide	106.9	103.9	2.9	1,908.9	5.6
6	D'Arcy Masius Benton & Bowles	99.6	80.1	24.3	2,050.3	4.9
7	Bozell	94.6	77.4	22.2	1,230.0	7.7
8	Young & Rubicam	84.9	115.1	-26.2	2,026.6	4.2
9	Grey Advertising	78.5	106.0	-25.9	1,800.2	4.4
10	McCann-Erickson Worldwide	75.0	75.0	0.0	1,417.1	5.3

Consumer magazine						
1	Saatchi & Saatchi Advertising Worldwide	\$297.8	\$289.1	3.0	\$1,908.9	15.6
2	D'Arcy Masius Benton & Bowles	213.7	186.0	14.9	2,050.3	10.4
3	J. Walter Thompson Co.	207.1	204.1	1.5	1,663.5	12.5
4	Leo Burnett Co.	189.9	205.5	-7.6	2,040.3	9.3
5	Lintas:Worldwide	185.7	126.5	46.8	993.7	18.7
6	McCann-Erickson Worldwide	185.0	170.0	8.8	1,417.1	13.1
7	Bozell	180.7	156.8	15.2	1,230.0	14.7
8	DDB Needham Worldwide	177.7	179.4	-0.9	1,688.7	10.5
9	Grey Advertising	174.3	200.9	-13.2	1,800.2	9.7
10	Young & Rubicam	168.6	238.0	-29.2	2,026.6	8.3

Sunday newspaper distributed magazine						
1	TBWA Advertising	\$13.7	\$12.5	9.3	\$303.7	4.5
2	Ross Roy Inc.	11.1	9.3	19.3	447.0	2.5
3	Lois/USA	11.0	10.0	10.0	237.0	4.6
4	Noble Communications	5.9	6.4	-7.8	89.1	6.6
5	Laurence, Charles, Free & Lawson	5.1	5.0	1.0	285.0	1.8
6	Girgenti, Hughes, Butler & McDowell	4.9	0.0	NA	78.7	6.2
7	J. Richard Smith Advertising	4.3	4.3	0.0	45.5	9.4
8	Footo, Cone & Belding Communications	2.8	3.4	-19.4	2,032.0	0.1
9	N W Ayer	2.7	4.0	-33.0	754.4	0.4
10	Bernstein-Rein Advertising	2.2	2.5	-14.1	135.4	1.6

Business publications						
1	Ketchum Communications	\$61.7	\$54.9	12.3	\$878.5	7.0
2	Chiat/Day Mojo	57.4	NA	NA	637.0	9.0
3	Lintas:Worldwide	56.0	8.8	535.0	993.7	5.6
4	J. Walter Thompson Co.	53.2	61.9	-14.0	1,663.5	3.2
5	BBD0 Worldwide	49.7	27.4	81.3	1,554.0	3.2
6	Della Femina, McNamee	36.7	46.8	-21.7	713.0	5.1
7	McCann-Erickson Worldwide	33.0	30.0	10.0	1,417.1	2.3
8	Ogilvy & Mather Worldwide	26.5	31.2	-15.1	1,571.7	1.7
9	Young & Rubicam	25.4	28.4	-10.5	2,026.6	1.3
10	Footo, Cone & Belding Communications	24.8	24.0	3.2	2,032.0	1.2

Medical journals						
1	Klemtner Advertising	\$82.9	\$49.5	67.5	\$165.1	50.2
2	Lavey/Wolff/Swift	74.8	73.7	1.5	144.3	51.9
3	Sudler & Hennessey	32.7	33.5	-2.4	183.8	17.8
4	McCann-Erickson Worldwide	30.0	28.0	7.1	1,417.1	2.1
5	M.E.D. Communications	25.0	25.0	0.0	103.0	24.3
6	Cline, Davis & Mann	20.1	15.1	33.3	76.7	26.3
7	Dorritte Lyons & Nickel	18.9	30.6	-38.2	60.5	31.2
8	VICOM/FCB	17.3	21.4	-19.2	148.4	11.7
9	Kallir, Phillips, Ross	17.2	15.2	12.9	186.2	9.2
10	Abelson-Taylor	14.3	14.2	0.9	46.5	30.8

Farm publications						
1	Young & Rubicam	\$11.7	\$5.9	98.1	\$2,026.6	0.6
2	Bader Rutter & Associates	5.4	6.5	-16.2	60.5	9.0
3	Tucker Wayne/Luckie & Co.	4.1	4.3	-5.2	131.2	3.1
4	Rumrill-Hoyt	4.0	3.6	11.4	99.4	4.1
5	Al Paul Leffon Co.	4.0	4.1	-2.4	74.6	5.4
6	Lois/USA	3.0	2.5	20.0	237.0	1.3
7	Dudnyk Co.	2.6	2.9	-10.5	22.1	11.6
8	Valentine-Radford Communications	1.8	2.5	-29.5	95.4	1.8
9	John Volk Co.	1.3	1.2	13.7	13.3	9.8
10	Meyocks Benksstein Associates	1.0	0.8	30.6	11.9	8.5

Yellow Pages						
1	TMP Worldwide	\$409.1	\$351.7	16.3	\$409.1	100.0
2	Berry Network	147.0	121.6	20.9	147.0	100.0
3	Footo, Cone & Belding Communications	76.6	83.0	-7.7	2,032.0	3.8
4	Ketchum Communications	76.4	80.5	-5.2	878.5	8.7
5	D'Arcy Masius Benton & Bowles	47.3	54.0	-12.4	2,050.3	2.3
6	Ruppman Marketing Technologies	33.7	32.1	5.0	33.7	100.0
7	Cato Johnson Worldwide	18.7	20.5	-8.6	159.5	11.7
8	Bernard Hodes Group	18.7	24.8	-24.7	156.9	11.9
9	Bozell	18.0	20.3	-11.3	1,230.0	1.5
10	Ogilvy & Mather Yellow Pages	11.2	10.6	5.7	11.2	100.0

Rank	Agency	1991	Media billings 1990	% chg	Total billings 1991	Media % total billings 1991
Spot TV						
1	Saatchi & Saatchi Advertising Worldwide	\$515.5	\$500.4	3.0	\$1,908.9	27.0
2	Footo, Cone & Belding Communications	483.3	505.7	-4.4	2,032.0	23.8
3	Wells Rich Greene BDDP	391.5	375.1	4.4	923.7	42.4
4	D'Arcy Masius Benton & Bowles	348.8	448.6	-22.2	2,050.3	17.0
5	Grey Advertising	326.0	316.7	2.9	1,800.2	18.1
6	Campbell-Mithun-Esty	312.0	308.1	1.3	906.8	34.4
7	Young & Rubicam	304.6	356.7	-14.6	2,026.6	15.0
8	J. Walter Thompson Co.	302.1	355.1	-14.9	1,663.5	18.2
9	Backer Spielvogel Bates Worldwide	286.8	270.4	6.1	1,078.4	26.6
10	Admarketing	278.1	237.3	17.2	317.2	87.7

Network TV						
1	Saatchi & Saatchi Advertising Worldwide	\$809.4	\$785.9	3.0	\$1,908.9	42.4
2	Leo Burnett Co.	800.0	894.0	-10.5	2,040.3	39.2
3	D'Arcy Masius Benton & Bowles	760.0	731.7	3.9	2,050.3	37.1
4	Footo, Cone & Belding Communications	718.7	634.2	13.3	2,032.0	35.4
5	Young & Rubicam	669.8	564.9	18.6	2,026.6	33.0
6	Grey Advertising	621.8	634.5	-2.0	1,800.2	34.5
7	J. Walter Thompson Co.	617.8	523.6	18.0	1,663.5	37.1
8	McCann-Erickson Worldwide	522.0	493.0	5.9	1,417.1	36.8
9	BBD0 Worldwide	506.0	514.1	-1.6	1,554.0	32.6
10	Ogilvy & Mather Worldwide	486.5	504.9	-3.6	1,571.7	31.0

Cable TV						
1	Footo, Cone & Belding Communications	\$118.4	\$95.0	24.7	\$2,032.0	5.8
2	DDB Needham Worldwide	105.8	89.1	18.7	1,688.7	6.3
3	D'Arcy Masius Benton & Bowles	101.3	125.2	-19.1	2,050.3	4.9
4	Leo Burnett Co.	90.0	54.9	64.1	2,040.3	4.4
5	Saatchi & Saatchi Advertising Worldwide	82.0	79.6	3.0	1,908.9	4.3
6	Grey Advertising	68.6	69.6	-1.4	1,800.2	3.8
7	Young & Rubicam	61.8	78.8	-21.6	2,026.6	3.0
8	McCann-Erickson Worldwide	55.0	40.0	37.5	1,417.1	3.9
9	BBD0 Worldwide	52.7	49.2	7.1	1,554.0	3.4
10	Backer Spielvogel Bates Worldwide	48.8	NA	NA	1,078.4	4.5

Syndicated TV						
1	Leo Burnett Co.	\$134.5	\$138.5	-2.9	\$2,040.3	6.6
2	D'Arcy Masius Benton & Bowles	96.4	96.9	-0.6	2,050.3	4.7
3	Footo, Cone & Belding Communications	82.6	76.3	8.3	2,032.0	4.1
4	Jordan, McGrath, Case & Taylor	52.9	44.4	19.2	350.0	15.1
5	Backer Spielvogel Bates Worldwide	45.9	NA	NA	1,078.4	4.3
6	McCann-Erickson Worldwide	45.0	45.0	0.0	1,417.1	3.2
7	Ogilvy & Mather Worldwide	36.2	25.9	39.8	1,571.7	2.3
8	DDB Needham Worldwide	30.1	36.0	-16.3	1,688.7	1.8
9	Young & Rubicam	29.1	27.6	5.4	2,026.6	1.4
10	Saatchi & Saatchi Advertising Worldwide	26.7	26.0	2.7	1,908.9	1.4

Spot radio						
1	Footo, Cone & Belding Communications	\$111.5	\$128.4	-13.2	\$2,032.0	5.5
2	D'Arcy Masius Benton & Bowles	92.9	157.1	-40.8	2,050.3	4.5
3	Backer Spielvogel Bates Worldwide	86.0	73.8	16.5	1,078.4	8.0
4	DDB Needham Worldwide	85.0	102.8	-17.3	1,688.7	5.0
5	Bozell	80.7	79.4	1.6	1,230.0	6.6
6	Ketchum Communications	76.9	82.9	-7.2	878.5	8.8
7	Wells Rich Greene BDDP	73.9	63.1	17.1	923.7	8.0
8	BBD0 Worldwide	69.3	57.3	20.8	1,554.0	4.5
9	McCann-Erickson Worldwide	65.0	75.0	-13.3	1,417.1	4.6
10	J. Walter Thompson Co.	59.5	62.8	-5.3	1,663.5	3.6

Network radio						
1	Lintas:Worldwide	\$48.6	\$31.5	54.5	\$993.7	4.9
2	DDB Needham Worldwide	46.2	55.8	-17.2	1,688.7	2.7
3	D'Arcy Masius Benton & Bowles	41.6	31.0	34.3	2,050.3	2.0
4	Ogilvy & Mather Worldwide	37.5	38.8	-3.5	1,571.7	2.4
5	J. Walter Thompson Co.	31.2	23.3	34.0	1,663.5	1.9
6	N W Ayer	29.1	30.2	-3.6	754.4	3.9
7	Young & Rubicam	26.4	34.7	-24.0	2,026.6	1.3
8	Chiat/Day Mojo	24.0	30.2	-20.5	637.0	3.8
9	BBD0 Worldwide	19.0	16.8	13.2	1,554.0	1.2
10	Ross Roy Inc.	15.6	10.1	54.1	447.0	3.5

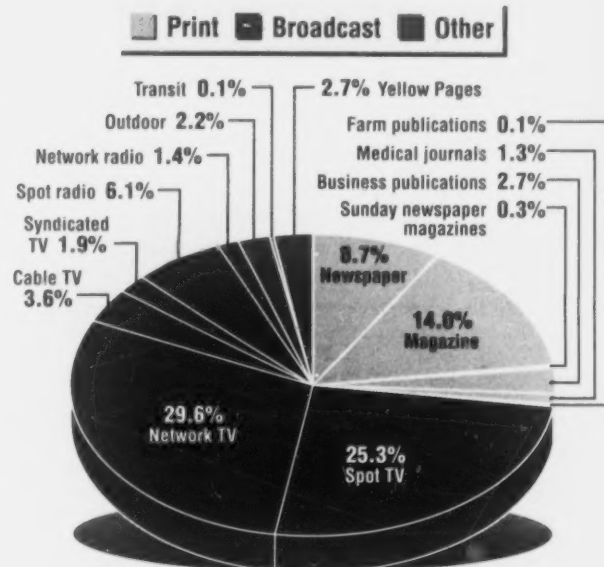
Outdoor						
1	Leo Burnett Co.	\$126.2	\$127.1	-0.7	\$2,040.3	6.2
2	Young & Rubicam	41.0	36.9	11.1	2,026.6	2.0
3	Wells Rich Greene BDDP	36.9	37.5	-1.6	923.7	4.0
4	Backer Spielvogel Bates Worldwide	35.9	36.4	-1.4	1,078.4	3.3
5	D'Arcy Masius Benton & Bowles	35.6	31.6	12.7	2,050.3	1.7
6	DDB Needham Worldwide	31.1	22.9	35.8	1,688.7	1.8
7	J. Walter Thompson Co.	26.1	25.5	2.4	1,663.5	1.6
8	McCann-Erickson Worldwide	25.0	15.0	66.7	1,417.1	1.8
9	Laurence, Charles, Free & Lawson	20.3	17.8	15.4	285.0	7.1
10	Saatchi & Saatchi Advertising Worldwide	19.1	18.5	3.2	1,908.9	1.0

Notes: Dollars are in millions.
See methodology on Page S-20.
Total agency billings and billings by media exclude the billings of all subsidiary agencies ranked in this report. (In some cases, subsidiary billings by media could not be obtained.)

U.S. media billings by category

Media	Billings reported by 424 agencies			Medium as percent of total	
	1991	1990	% chg	1991	1990
Print					
Newspaper	\$3,009.5	\$3,085.0	-2.4	8.7	8.9
Magazine	4,833.9	4,933.8	-2.0	14.0	14.2
Sunday magazines	90.9	105.0	-13.4	0.3	0.3
Business publications	950.8	911.2	4.3	2.7	2.6
Medical journals	451.2	442.9	1.9	1.3	1.3
Farm publications	46.9	41.8	12.1	0.1	0.1
Subtotal print	9,383.1	9,519.7	-1.4	27.1	27.4
Broadcast					
Spot TV	8,766.4	8,827.0	-0.7	25.3	25.4
Network TV	10,268.0	10,355.8	-0.8	29.6	29.8
Cable TV	1,240.5	1,115.8	11.2	3.6	3.2
Syndicated TV	670.7	646.8	3.7	1.9	1.9
Spot radio	2,108.7	2,139.2	-1.4	6.1	6.2
Network radio	486.7	483.1	0.7	1.4	1.4
Subtotal broadcast	23,540.9	23,567.6	-0.1	68.0	67.9
Other					
Outdoor	749.8	715.2	4.8	2.2	2.1
Transit	29.3	28.9	1.3	0.1	0.1
Yellow Pages	938.7	881.6	6.5	2.7	2.5
Subtotal other	1,717.8	1,625.8	5.7	5.0	4.7
Total	34,641.9	34,713.1	-0.2	100.0	100.0

Notes: Dollars are in millions. Information in this chart is compiled from media breakouts supplied by 424 of 532 U.S.-based agencies. Not all agencies break out media for this survey.



AA graphic: John Hall; AA chart: Kevin Brown

Officer: Tim Cronin, ceo
Headquarters: Rumrill-Hovt 66 Corporate Woods/
Rochester, N.Y. 14623/Phone: (716) 272-6100

Team One Advertising			
1991	1990	% chg	
Gross income	\$27.5	\$20.7	33.3
Volume	\$183.5	\$137.7	33.3
Employees	144	116	22.0
Offices	4	3	33.3

Officer: John Hirschbach, pres
Headquarters: Team One Advertising/1660 E.
Grand Ave., Suite 200-12 Segundo, Calif. 90245/
Phone: (310) 615-2000

Backer Spielvogel Bates Worldwide

Consolidated returns (\$ in millions)			
1991	1990	% chg	
Gross income	\$630.4	\$618.9	1.9
Volume	\$4,266.3	\$4,200.6	1.6
Employees	8,041	8,062	-0.3
Offices	211	168	25.6
U.S.			
Gross income	\$205.1	\$213.0	-3.7
Volume	\$1,407.0	\$1,460.1	-3.6
Employees	1,770	2,012	-12.0
Offices	21	21	0.0
Asian offices			
Backer Spielvogel Bates, Hong Kong(MJ)	49.6		
BSB Japan, Tokyo(MJ)	51.7		
BSB Malaysia, Kuala Lumpur(MJ)	20.7		
BSB New Zealand, Auckland(MJ)	12.6		
BSB Singapore, Singapore(MJ)	7.4		
BSB Taiwan, Taipei(MJ)	5.1		
BSB Thailand, Bangkok(MJ)	6.2		
Diamond Ad, Seoul(MN)	112.5		
George Patterson Pty., Sydney(MJ)	497.8		
P.T. Bates Mulia, Jakarta(JV)	5.9		
Sista's Private, Bombay(NE)	7.9		
European offices			
AdPlus Werbung & Media, Zurich(NE)	1.9		
BSB Amsterdam, Amsterdam(MJ)	41.0		
BSB Athens, Athens(MJ)	16.5		
BSB Bates Gruppen, Oslo(MJ)	164.4		
BSB Brussels, Brussels(MJ)	35.0		
BSB Dierland, London(MJ)	554.7		
BSB Finnad, Helsinki(MJ)	59.3		
BSB France, Puteaux(MJ)	108.4		
BSB Frankfurt, Frankfurt(MJ)	99.9		
BSB Gruppen, Copenhagen(MJ)	112.7		
BSB Hunter, Dublin(MJ)	15.2		
BSB Italia, Milan(MJ)	93.2		
BSB Portugal, Lisbon(MJ)	22.5		
BSB Sweden, Stockholm(MJ)	68.6		
Dr. Puttner & BSB, Vienna(MJ)	47.1		
Grupo BSB, Madrid(MJ)	359.4		
Rota Advertising, Istanbul(NE)	11.4		
Scholz & Friends, Hamburg(MJ)	262.1		
Latin American offices			
Arellano BSB Publicidad, Mexico City(MN)	24.1		
BSB Chile, Santiago(NE)	1.7		
BSB de Colombia, Bogota(NE)	8.1		
BSB Ghery Quintero, Caracas(NE)	10.2		
Cicero BSB Publicidad, Buenos Aires(NE)	3.7		
Denison BSB, Sao Paulo(NE)	18.5		
Martinez Ted Bates BSB, Montevideo(NE)	0.2		
Pordano Ted Bates Publicidad, Lima(NE)	0.3		
VIP BSB Publicidad, Quito (NE)	1.5		
Other offices			
BSB Canada, Toronto(MJ)	101.6		
BSB Bates, Johannesburg(NE)	66.0		
Fortune Promoseven, Manama(NE)	65.9		
Insight Communications, Lagos(NE)	12.3		

Notes: Backer Spielvogel Bates Worldwide is a consolidation of Kobs & Draft, AC&R Advertising and the worldwide Backer Spielvogel Bates agency network. AC&R Advertising reported to S&SAW in 1990, but swung to the BSB side in 1991 where it operates independent of BSB. The switch largely followed account alignments. Estee Lauder Inc., AC&R's largest account, is handled in international markets by BSB. AC&R, as a reporting unit of S&SAW, would have been a liability to S&SAW in its big '90 get.

Procter & Gamble's Max Factor business last year. The switch also came after a failed attempt by AC&R management to buy back the agency. AC&R returns for both 1991 and 1990 do not include the Entertainment Division (formerly Diener-Hauser/Bates), a unit shut down in early 1991. In 1990, the Entertainment Division accounted for \$11.5 million in gross income on billings of \$101 million. AC&R's Irvine, Calif., shop also folded at yearend, only six months after it had regained its old name, Cochran Chase. Livingston BSB largely has no equity in its Latin American network, and AA does not include those returns in BSB's totals even though BSB notes 20-25% of the billings from these shops is from network accounts requiring service in the region.

Officers: Carl Spielvogel, chmn-cco; William M. Backer, pres-cco; creative dir. Alvin A. Achenbaum, vice chmn-professional svcs.
Headquarters: Backer Spielvogel Bates Worldwide/405 Lexington Ave./New York, N.Y. 10174/Phone: (212) 297-7000

AC&R Advertising			
1991	1990	% chg	
Gross income	\$19.9	\$22.1	-10.1
Volume	\$172.7	\$189.8	-9.0
Employees	188	260	-27.7
Offices	1	1	0.0

Officer: Alvin Cherskin, chmn
Headquarters: AC&R Advertising/16 E. 32nd St./New York, N.Y. 10016/Phone: (212) 696-3900

Kobs & Draft			
1991	1990	% chg	
Gross income	\$49.9	\$41.8	19.4
Volume	\$324.6	\$273.1	18.8
Employees	438	402	9.0
Offices	21	21	0.0

Notes: CME appeared in AA's Agency Report last year as part of BSB.
Officer: William Dunlap, ceo
Headquarters: Campbell-Mithun-Esty/222 S. Ninth St./Minneapolis, Minn. 55402/Phone: (612) 347-1000

Creators & Managers of Names Worldwide
Global Access to Business Names Research & Data
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U.S.			
1991	1990	% chg	
Gross income	\$23.4	\$20.1	16.1
Volume	\$155.9	\$134.3	16.1
Employees	165	155	6.5
Offices	2	2	0.0

Asian offices
Kobs & Draft Bond Direct, Melbourne/Sydney(MJ) 26.6
K&D Asia, Hong Kong(MJ) 23.9

European offices			
1991	1990	% chg	
K&D, Paris(MJ)	29.8		
K&D, Oslo(MJ)	8.3		
K&D, London(MJ)	35.5		
K&D, Amsterdam(MJ)	2.1		
K&D, Madrid(MJ)	20.1		
K&D, Stockholm(MJ)	2.4		
K&D, Helsinki(MJ)	2.2		
K&D, Athens(NE)	1.8		
K&D, Milan(MJ)	1.2		
K&D Werbeagentur, Hamburg/Stuttgart(MJ)	45.3		

Canadian offices
K&D, Toronto(MJ) 2.2
Officers: Howard Draft, ceo; Dan Ginsburg, pres-Kobs & Draft Worldwide; Richard Meyers, exec vp, dir-finance, treasurer; Sid Liebenow, exec vp, dir-mktg.
Headquarters: Kobs & Draft/142 E. Ontario St./Chicago, Ill. 60611/Phone: (312) 944-3500

Campbell-Mithun-Esty			
1991	1990	% chg	
Gross income	\$122.2	\$120.3	1.6
Volume	\$906.8	\$892.5	1.6
Employees	1,041	1,169	-10.9
Offices	4	4	0.0

Notes: CME appeared in AA's Agency Report last year as part of BSB.
Officer: William Dunlap, ceo
Headquarters: Campbell-Mithun-Esty/222 S. Ninth St./Minneapolis, Minn. 55402/Phone: (612) 347-1000

RANK: 34

Sogei

Tokyo
Gross income: \$68.4 million

Organization totals (\$ in millions)

Worldwide			
1991	1990	% chg	
Gross income	\$68.4	\$57.8	18.3
Volume	\$433.0	\$364.6	18.7
Employees	525	479	9.6
Offices	9	8	12.5

Notes: Worldwide totals in the tables for Sogei are all from Japan. Sogei owns 100% of a Brazilian shop, Sogei do Brasil Publicidade, but did not fold into its totals results of the agency, a start-up shop. Sogei also includes four non-advertising businesses: Sogei Kobo, a printing operation; Soken, creative production; Sokenya, real estate-related market research; and UDR (Urban Development Research), or urban area marketing institutes. The latter was established in late 1990. These non-ad units accounted for gross income of \$9.6 million on billings of \$63.7 million in 1991, and gross income of \$4.8 million on billings of \$32.3 million in 1990.
Officers: Hirobumi Senoh, pres-cco; Yasuo Tanaka, exec mg dir-executive officer; Hiroshi Kubota, mg dir-executive officer; Takeyoshi Muroya, exec vp.
Headquarters: Sogei/1-15-7 Tsukishima Chuo-ku/Tokyo 104, Japan/Phone: 813-3532-6301/Fax: 813-3532-6380

RANK: 21

TBWA Advertising

New York
Gross income: \$144.8 million

Organization totals (\$ in millions)

Worldwide			
1991	1990	% chg	
Gross income	\$144.8	\$137.8	5.1
Volume	\$1,001.9	\$919.0	9.0
Employees	1,002	998	0.4
Offices	16	16	0.0

U.S. offices
1991 1990 % chg
Gross income \$45.6 \$42.2 8.0
Volume \$303.7 \$281.2 8.0
Employees 301 298 1.0
Offices 2 2 0.0
U.S. offices
TBWA Advertising, New York 233.5
TBWA Kerlick Switzer, St. Louis 70.2
European offices
TBWA, Brussels(MJ) 37.1
TBWA, Frankfurt(MJ) 158.3
TBWA, Zurich(MJ) 14.1
TBWA, Amsterdam(MJ) 68.5
TBWA, Milan(MJ) 143.7
TBWA, Madrid(MJ) 57.7
TBWA de Piaz, Paris(MJ) 83.7
TBWA Holmes Knight Ritchie, London(MJ) 135.1
Notes: TBWA in 1991 purchased two U.S. specialty advertising shops: Lois Geller Direct and Butler, a sales promotion company. Figures for both are folded into the New York office totals.

ABC Namebank is a leading name development company helping Fortune 500 and leadership corporations on all types of national and global naming issues.

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For all types of naming, ABC is an excellent source for new, unique and powerful names which are highly suitable to marketing goals and equally available for worldwide registration.

For more information contact:

Naseem Javed, President: ABC Namebank International.
122 East 42nd Street, Suite 1700, Chanin Bldg.,
New York, NY 10168. TEL: 212-697-7700.

TBWA also merged TBWA London with Holmes Knight Ritchie to form TBWA HKR, London, in early 1991. Totals treat the merger as if it occurred the beginning of 1990.
Officers: William Tragos, chmn-coo; Richard Costello, pres-coo; Michael Switzer, chmn-TBWA Kerlick Switzer; Stuart Loss, exec vp-finance dir.
Headquarters: TBWA Advertising/292 Madison Ave./New York, N.Y. 10017/Phone: (212) 725-1150.

RANK: 35

Armando Testa Group Worldwide

Milan, Italy
 Gross income: \$67.1 million

Organization totals (\$ in millions)

Worldwide	1991	1990	% chg
Gross income	\$67.1	\$64.3	4.3
Volume	\$515.0	\$481.8	6.9
Employees	550	499	10.2
Offices	19	20	-5.0
U.S.	1991	1990	% chg
Gross income	0.0	0.6	NA
Volume	0.0	4.2	NA
Employees	NA	NA	NA
Offices	NA	NA	NA
European offices			Billings
154-Testa International, Paris(MN)			30.0
Dayas Testa International, Barcelona(MN)			30.0
Gruppo Armando Testa, Turin(MJ)			490.3

Notes: Armando Testa Group Worldwide is a European network of agencies. Half are linked to Testa on a non-equity basis. Flagship agency is in Turin, Italy. Connected to Testa are non-equity shops Simons Testa International, London; Eiler & Riemel Testa International, Munich; Hager Testa International, Vienna; and HSG&L, Zurich. Founder Armando Testa died March 20, 1985, his son, has directed the company since 1985.

Officers: Marco Testa, coo; Andrea Gavotto, exec vp; Eugenio Bona, exec vp; Mario de Barbieri, exec vp.

Headquarters: Armando Testa Group Worldwide/Via Washington, 17/20146 Milan, Italy/Phone: 392-48-08-21/Fax: 392-48-19-37-24

RANK: 37

TMP Worldwide

New York
 Gross income: \$65.3 million

Organization totals (\$ in millions)

Worldwide	1991	1990	% chg
Gross income	\$65.3	\$55.8	17.0
Volume	\$435.3	\$371.9	17.0
Employees	829	922	-10.1
Offices	34	34	0.0
U.S.	1991	1990	% chg
Gross income	\$61.4	\$52.8	16.3
Volume	\$409.1	\$351.7	16.3
Employees	785	878	-10.6
Offices	28	28	0.0
European offices	Billings		
Servicio Marketing Elenchi Telefonici, Milano(MJ)			3.3
Programmes Marketing Annuaire, Paris(MJ)			8.1
TMP-LTD, Essex, England(MJ)			4.3

Officers: Andrew J. McKelvey, pres; David Hosokawa, coo; Harold L. Levy, sr vp-sales & mktg; Thomas G. Collison, sr vp-coo.

Headquarters: TMP Worldwide/1633 Broadway/New York, N.Y. 10019/Phone: (212) 977-4200.

RANK: 16

Tokyu Agency

Tokyo
 Gross income: \$176.9 million

Organization totals (\$ in millions)

Worldwide	1991	1990	% chg
Gross income	\$176.9	\$170.3	3.9
Volume	\$1,482.4	\$1,387.0	6.9
Employees	1,110	1,017	9.1
Offices	6	6	0.0

Notes: Tokyu totals include returns for both years of Image Studio 109, a rental photo studio, Hansoku Kaihatsu, a sales promotion and novelties business, and Tokyu Space Development, an outdoor and transit agency. Together they contributed an estimated \$10.7 million equity gross income on billings of \$69 million in 1991. Worldwide totals in the tables are all from Japan.

Officers: Mamoru Miura, chmn; Tohru Maeno, pres; Toshio Wakabayashi, sr mg dir; Isamu Matsumura, sr mg dir.

Headquarters: Tokyu Agency/4-8-18 Akasaka, Minato-ku/Tokyo 107, Japan/Phone: 813-3404-5321/Fax: 813-3404-5016.

Consolidation note

Agencies are shown by 100% of their returns in profiles of the World's Top 50 Agency Organizations. However, only their equity portion is included in the parent organization's totals comprising the ranking.

Foreign agencies (continued)

Agency, city, equity	Gross income	% chg	1991 Billings
Sweden Exchange rates: 0.165950 0.168070 kroner -1.3%			
KREAB, Stockholm NA	10,300	7.3	77,000
BSB Sweden, Stockholm MJ	10,300	-23.4	68,597
Lyberg Group, Stockholm NE	7,533	13.2	56,268
HLR & Co./BBDO Reklambyra, Stockholm MN	6,245	-7.1	34,942
Lintas:Stockholm, Stockholm MJ	5,747	6.5	38,329
Intermarco/FCB, Stockholm MJ	5,597	-16.7	37,315
Hawi Euro RSCG, Stockholm MJ	5,144	5.5	NA
Soren Blanking, Stockholm NE	4,896	14.2	55,261
Welinder, Stockholm NA	3,941	7.6	29,871
Carlsson & Broman/DOB Needham, Stockholm MJ	3,903	1.7	26,032
Ehrenstrahle & Co., Stockholm MJ	3,783	-5.7	25,218
DMB&B, Stockholm MJ	3,650	2.1	34,689
J. Walter Thompson Co., Stockholm MJ	3,309	21.1	22,059
SSBC, Stockholm MJ	2,407	-9.9	16,126
Saatchi & Saatchi Advertising, Stockholm MJ	2,315	-4.5	14,445
Serrander Alliance, Stockholm NE	1,908	170.4	12,778
Hera Ogilvy & Mather, Stockholm MJ	1,522	15.7	10,495
Conquest Europe Sweden, Stockholm MJ	680	11.5	4,650
JGM Annonbyra, Stockholm NA	589	7.9	2,821
Kobs & Draft Adaptus Direct, Stockholm MJ	360	4.3	2,400
GGK/Laurent, Stockholm MJ	37	NA	250

Notes: Hall & Coderquist/Y&R includes Wunderman, Cato Johnson, Burson-Marsteller and Landor; Soren Blanking affiliated with CDP Europe; Serrander Alliance 1990 figures are for 6 months; McCann-Erickson includes Ronberg Sweden and Werne/M&E Stockholm; Lintas Stockholm includes Initiative Media.

Switzerland Exchange rates: 0.703542 0.715300 Swiss franc -1.6%			
Advico Young & Rubicam, Zurich MJ	21,585	-8.4	160,216
GGK Basel/Geneva/Zurich, Basel/Geneva/Zurich MJ	15,654	-8.9	113,130
Wirz Advertising, Zurich MJ	13,684	9.3	91,271
McCann-Erickson Switzerland, Zurich MJ	13,047	8.7	87,023
Publicis FCB, Zurich MJ	11,226	2.6	74,879
Eurocom Advertising, Zurich MJ	9,990	-15.4	66,696
ASGS/BBDO Group, Zurich MN	9,059	-28.5	67,439
Lintas:Zurich, Zurich MJ	7,747	13.6	51,669
Marti, Ogilvy & Mather, Zurich MJ	6,919	0.5	47,720
Impuls, Zurich NE	6,134	-4.0	41,157
Grey, Geneva/Zurich MN	5,403	-1.5	36,060
J. Walter Thompson Co., Zurich MJ	4,411	15.3	29,420
Bozell Advertising, Geneva NE	4,361	15.9	28,550
DOB Needham, Kuesnacht/Zurich MN	3,691	-4.6	24,622
SSBC, Nyon/Zurich MJ	3,449	-18.1	22,457
Smart Marketing Services, Geneva MJ	3,381	2.7	11,739
Cash RSCG, Werbeagentur BSW, Zurich MJ	2,885	3.4	19,347
ZKG Group, Zurich NA	2,322	41.1	15,486
TBWA, Zurich MJ	2,110	-36.6	14,071
Mueller & Partner/Alliance, Zurich MN	633	10.7	4,081
Conquest Europe Switzerland, Zurich MJ	381	-3.5	3,728
AdPlus Werbung & Media, Zurich NE	281	NA	1,900

Notes: Advico Young & Rubicam includes Wunderman, Cato Johnson and Burson-Marsteller; ASGS/BBDO Group includes ASGS Editorial, ASGS/BBDO Zurich, ASGS Identity, ASGS Direct and ASGS/BBDO Basel; McCann-Erickson includes Unimedia, SA & ME Services; Impuls affiliated with Saatchi & Saatchi Advertising; AdPlus Werbung & Media affiliated with BSB.

Taiwan Exchange rates: 0.037575 0.037770 Taiwan dollar -0.5%			
Ogilvy & Mather, Taipei MJ	9,274	14.3	63,962
United Advertising, Taipei NA	7,402	18.1	50,726
McCann-Erickson Taiwan, Taipei MJ	6,922	20.9	46,170
J. Walter Thompson Co., Taipei MJ	5,407	27.1	36,072
Hwa Wei & Grey, Taipei MN	4,997	26.0	33,333
H&Y Communications, Taipei MJ	3,927	-12.0	21,564
Regal International Advertising, Taipei NA	3,795	-8.0	24,846
Bozell CCAA Advertising, Taipei MN	3,541	-10.2	24,424
Saatchi & Saatchi Advertising, Taipei MJ	3,143	9.5	20,904
Lintas:Taiwan, Taipei MJ	2,898	4.0	19,331
Leo Burnett Co., Taipei MJ	2,882	3.8	19,212
Public/FCB Communications, Taipei MN	2,615	18.4	17,439
DIK-Ocean Advertising, Taipei MJ	2,255	-3.0	15,030
Stentor BBDO, Taipei MJ	1,876	-19.0	12,516
DOB Needham, Taipei MJ	1,653	17.8	11,028
Target Advertising, Taipei NA	1,653	-31.6	10,408
Dentsu, Young & Rubicam Taiwan, Taipei MJ	1,540	35.7	10,273
Golden Flower Alliance, Taipei NE	1,353	-0.5	9,018
Bali Partnership, Taipei MJ	1,127	2.6	7,515
BSB Taiwan, Taipei MJ	956	11.4	5,143

Notes: McCann-Erickson Taiwan includes McCann-Tuntes Ltd. agencies.

Thailand Exchange rates: 0.039303 0.041630 baht -5.6%			
Ogilvy & Mather, Bangkok MJ	13,362	19.0	92,153
Lintas:Thailand, Bangkok MJ	10,937	16.7	72,947
Far East Advertising, Bangkok MN	5,385	10.0	35,921
Spa Advertising, Bangkok NA	5,306	-0.4	29,399
Leo Burnett Co., Bangkok MJ	5,290	30.4	35,272
Prakti & FCB, Bangkok MN	4,716	2.3	28,298
Dentsu, Young & Rubicam, Bangkok MJ	3,763	45.5	25,096
McCann-Erickson Thailand, Bangkok MJ	3,686	15.1	24,586
J. Walter Thompson Co., Bangkok MJ	3,413	29.2	21,624
Thai Hakuhodo, Bangkok MN	2,653	47.4	16,507
Bali Partnership, Bangkok MN	2,428	41.9	16,198
Amex Team Advertising, Bangkok NE	2,190	24.2	14,608
Saatchi & Saatchi Advertising, Bangkok MJ	2,044	46.1	11,476
Dai-ichi Kikaku Thailand, Bangkok MJ	1,723	10.9	9,570
DOB Needham, Bangkok MJ	1,472	17.3	9,818
Synergie Tokyo DMB&B, Bangkok MN	1,166	56.1	6,901
Grey Thailand, Bangkok MN	1,085	48.5	7,235

Foreign agencies (continued)

Agency, city, equity	Gross income	% chg	1991 Billings
Thailand Exchange rates: 0.039303 0.041630 baht -5.6%			
BSB Thailand, Bangkok MJ	928	54.7	6,184
Hakuhodo Bangkok, Bangkok MN	475	51.3	2,100
Spaulding & Partners, Bangkok NE	373	-5.6	2,490

Notes: Amex Team affiliated with Bozell; Far East Advertising is 10% owned by DOB Needham; Spaulding & Partners affiliated with Chai/D&M; DMB&B holds 40% equity in Synergie Tokyo DMB&B.

Turkey Exchange rates: 0.000264 0.000398 lira -33.7%			
Cenajans/Grey, Istanbul MN	7,915	3.1	52,791
Guzel Sanatlar/Saatchi & Saatchi, Istanbul NE	7,543	12.5	51,385
Manajans-Thompson, Istanbul MN	6,279	21.0	37,352
Pars/McCann-Erickson, Istanbul MJ	4,562	-1.1	30,429
Moran, Ogilvy & Mather, Istanbul MN	4,479	25.0	27,646
Young & Rubicam Turkey, Istanbul MJ	3,292	17.8	21,958
Ajans Ada, Istanbul NA	2,870	-33.2	19,112
Grafika:Lintas, Istanbul MN	2,797	2.6	18,657
Merkez Ajans, Istanbul NA	2,533	20.7	14,745
Markom/Leo Burnett, Istanbul MN	2,050	18.7	13,665
RPM Radar, Istanbul MN	2,007	-24.6	13,587
Yorum, Istanbul NA	1,927	93.7	20,236
Ira Reklam Ajansi, Istanbul NA	1,767	106.5	16,127
Yaratim/Publicis FCB, Istanbul MN	1,587	11.0	10,824
Penajans DMB&B, Istanbul MN	1,403	68.6	11,690
Admar, Istanbul NE	1,224	13.9	8,316
Az Ajans Advertising, Istanbul NA	1,195	NA	15,725
Hancilik Reklam Ajansi, Istanbul NA	1,187	20.8	9,413
Birlesik Reklamcilar, Istanbul NA	1,167	14.5	8,414
Ajans Ultra Reklam, Istanbul NE	1,027	32.3	5,851
Rota Advertising, Istanbul NE	1,006	3.8	11,386
Parajans, Istanbul NA	942	222.2	8,666
Repro Reklam Ajansi, Istanbul NA	923	49.5	8,022
Ajans Erol Reklam, Istanbul NA	902	-21.1	6,926
Era Tanitim ve Yayin, Istanbul NA	890	46.1	7,224
Alice/BBDO, Istanbul MN	755	158.7	9,700
Birikim Reklamcilik, Istanbul MN	734	-15.1	5,101
Euro RSCG Folmar Advertising, Istanbul MJ	679	12.2	4,578
Reklamcilik Ticaret, Istanbul NA	546	-6.4	4,282
A4 Reklamcilik, Istanbul NE	449	-6.0	2,772
Bozell Poyraz, Istanbul NE	417	61.2	2,670
Kampanya Reklam Hizmetleri, Istanbul NA	370	-22.6	4,752
Cozum Reklamcilik, Istanbul NA	256	14.3	3,034
Prizma Reklam Hizmetleri, Istanbul NA	198	-72.4	1,990
Sonat Reklam Ajansi, Istanbul NA	107	-61.5	1,061
MS Reklam Hizmetleri, Istanbul NA	104	-47.5	1,030

Notes: CDP Europe holds 30% equity in RPM Radar; Rota Advertising affiliated with BSB; EFA holds 10% equity in Birikim Reklamcilik; Admar affiliated with DOB Needham; A4 Reklamcilik affiliated with TBWA International; BBDO holds 30% equity in Alice BBDO; Ajans Ultra Reklam affiliated with BBDO; Paris.

United Arab Emirates Exchange rates: 0.272317 0.272770 dirham -0.2%			
Public-Graphics, Dubai NA	11,000	22.2	72,000
Madeo Gulf-Dubai, Dubai MJ	2,621	6.6	8,088
TMI, Dubai NE	1,510	2.5	10,072
Gulf Marketing & Servicing, Dubai NA	1,362	42.6	6,808
Pangulf Publicity, Dubai NA	1,046	-2.7	4,929
Inca Tanvir Advertising, Sharjah NA	666	-5.4	4,439
Impact/BBDO Dubai, Dubai MN	559	-28.0	3,723
Transgulf Design & Advertising, Sharjah NA	400	NA	2,570
Arab Advertising Dubai, Dubai NA	368	-18.3	2,451

Notes: TMI affiliated with J. Walter Thompson Co.

Uruguay Exchange rates: 0.000531 0.000996 peso -46.7%			
Corporacion/Thompson, Montevideo NE	1,890	125.0	7,000
Punto Publicidad, Montevideo NE	1,715	23.9	11,431
McCann-Erickson Uruguay, Montevideo MJ	1,014	56.2	6,763
Vice Versa/Young & Rubicam, Montevideo NE	506	NA	3,824
Grey Uruguay, Montevideo MN	490	36.7	3,268
Martirene/Ted Bates BSB, Montevideo NE	5	NA	247

Notes: Punto Publicidad affiliated with Ogilvy & Mather.

Venezuela Exchange rates: 0.017875 0.021790 bolivar -18.0%			
Corpa, Caracas MN	11,225	37.3	77,414
Leo Burnett-Venezuela, Caracas MJ	5,293	18.7	35,286
J. Walter Thompson de Venezuela, Caracas MJ	5,232	13.5	34,878
McCann-Erickson Publicidad, Caracas MJ	4,871	30.2	32,490
JMC Creatividad Orientada/Y&R, Caracas MJ	4,826	60.9	32,193
Fischer-Grey, Caracas MJ	3,505	50.3	23,380
AW/SSA, Caracas MN	2,756	39.5	18,384
FCB/Siboney/Blanco Uribe, Caracas MJ	2,166	-5.0	14,444
BSB Ghersi Quintero, Caracas NE	2,038	8.7	10,189
Franklin White & Associates, Caracas NE	1,796	12.5	11,982
PVA/BBDO, Caracas MN	1,469	19.0	7,344
DMB&B de Venezuela, Caracas MN	1,255	81.7	5,956
Vapro Publicidad, Caracas NE	959	38.4	6,793

Notes: Corpa 1994 owned by Ogilvy & Mather; Franklin White & Associates affiliated with Lintas Worldwide; Vapro Publicidad affiliated with Bozell.

In the 46 foreign agency charts, an agency's equity position is indicated by **MJ** Majority-owned, **51%-100%**, **Minority-owned**, **1%-49%**, **NA** Not applicable, **50/50** joint venture. The agencies presented below did not appear elsewhere in this issue because their countries of origin were not among the 46 charted and they remain independent of any international network, whose agencies were broken out as part of the profiles of the World's Top 50 Advertising Organizations. Those agencies and their 1991 gross income were:

- MADCO-Bahrain, \$1,031,959
- MADCO-Beirut, \$175,000
- MADCO-Kuwait, \$386,702
- Almiral y Compania, Asuncion, \$260,000
- Mark-Plan, Pancevo, Yugoslavia, \$340,139

RANK: 1

WPP Group

London
Gross income: \$2,661.8 million

Organization totals (\$ in millions)

Worldwide	1991	1990	% chg
Gross income	\$2,661.8	\$2,715.0	-2.0
Volume	\$17,915.8	\$18,095.0	-1.0
Employees	20,900	22,000	-5.0
Offices	625	635	-1.6
U.S.	1991	1990	% chg
Gross income	\$1,303.9	\$1,330.0	-2.0
Volume	\$8,692.2	\$8,953.0	-2.9
Employees	NA	NA	NA
Offices	NA	NA	NA

European offices	1991	1990	% chg
Conquest Europe Austria, Vienna(MJ)	1.8		
Conquest Europe Belgium, Brussels(MJ)	12.1		
Conquest Europe France, Paris(MJ)	13.5		
Conquest Europe Germany, Frankfurt(MJ)	8.7		
Conquest Europe Greece, Athens(JV)	4.6		
Conquest Europe Italy, Milan(MJ)	34.1		
Conquest Europe Netherlands, Amsterdam(MJ)	7.5		
Conquest Europe Spain, Madrid(MJ)	15.2		
Conquest Europe Sweden, Stockholm(MJ)	4.7		
Conquest Europe Switzerland, Zurich(MJ)	3.7		
Landsenduro London, London(MJ)	106.5		

Notes: WPP Group has three major U.S.-based advertising agency networks: Ogilvy & Mather Worldwide, J. Walter Thompson Co. and Scali, McCabe, Sloves. A fourth network, Conquest Europe, is a small European-based network that used to be affiliated with JWT. Advertising comprises 86% of WPP's total gross income. The remainder comes from marketing services companies, including Hill & Knowlton, pr. MRB Group, market research, Business Design Group, graphics and design, Grass Roots Group, incentive and motivation, Elmsom Freeman and Promotional Campaigns, sales promotion, and Anspach Grossman Portugal, Mendoza Dillon & Asociados and HLS Corp., specialty agencies. The non-advertising total of \$388.3 million gross income is in non-U.S. totals.

Officers: Martin Sorrell, ceo; Robert Lerwill, cfo; David Ogilvy, non-exec chmn.
Headquarters: WPP Group/27 Farm St./London W1X 6RD, England/Phone: 4471-408-2204/Fax: 4471-872-8088

Ogilvy & Mather Worldwide

Consolidated returns (\$ in millions)

Worldwide	1991	1990	% chg
Gross income	\$794.9	\$775.3	2.5
Volume	\$5,520.7	\$5,374.8	2.7
Employees	10,000	10,000	0.0
Offices	275	292	-5.8
U.S.	1991	1990	% chg
Gross income	\$322.4	\$321.7	0.2
Volume	\$2,242.5	\$2,219.7	1.0
Employees	2,581	2,708	-4.7
Offices	NA	NA	NA

U.S. offices	1991	1990	% chg
Ogilvy & Mather, Atlanta	45.5		
Ogilvy & Mather, New York	705.0		
Ogilvy & Mather, Honolulu	16.7		
Ogilvy & Mather, Chicago	485.0		
Ogilvy & Mather, Houston	130.0		
Ogilvy & Mather, Los Angeles	170.0		

Asian offices	1991	1990	% chg
Interflow Communications, Karachi(NE)	10.7		
Korad Ogilvy & Mather, Seoul(MN)	191.8		
Ogilvy & Mather, Wellington(MJ)	42.4		
Ogilvy & Mather, Kuala Lumpur(MJ)	36.5		
Ogilvy & Mather, Sydney(MJ)	95.9		
Ogilvy & Mather, Taipei(MJ)	64.0		
Ogilvy & Mather, Bangkok(MJ)	92.2		
Ogilvy & Mather, Bombay(MN)	33.3		
Ogilvy & Mather, Hong Kong(MJ)	104.0		
Ogilvy & Mather, Manila(MN)	0.4		
Ogilvy & Mather, Singapore(MJ)	52.9		
P.T. Indo Ad, Jakarta(NE)	18.4		

European offices	1991	1990	% chg
Bossal, Ogilvy & Mather, Madrid(MJ)	301.5		
Bold Advertising/Ogilvy & Mather, Athens(MN)	45.5		
Hera Ogilvy & Mather, Stockholm(MJ)	10.5		
HHO Ogilvy & Mather, Brussels(MJ)	98.2		
Livraghi, Ogilvy & Mather, Milan(MN)	143.1		
Marti, Ogilvy & Mather, Zurich(MJ)	47.7		
Moran, Ogilvy & Mather, Istanbul(MN)	27.6		
Ogilvy & Mather, Vienna(MJ)	61.4		
Ogilvy & Mather, Copenhagen(MJ)	42.4		
Ogilvy & Mather, Lisbon(MJ)	45.0		
Ogilvy & Mather, London(MJ)	593.1		
Ogilvy & Mather, Oslo(MJ)	43.4		
Ogilvy & Mather, Helsinki(MJ)	20.5		
Ogilvy & Mather, Frankfurt(MJ)	353.5		
Ogilvy & Mather, Budapest(MJ)	10.3		
Ogilvy & Mather, Amsterdam(MJ)	160.3		
Ogilvy & Mather, Paris(MJ)	348.3		
Prad O&M Direct, Athens(MN)	7.2		
Tizza, Ogilvy & Mather, Moscow(MN)	0.6		
Wilson Hartnell Group, Dublin(MJ)	58.4		

Latin American offices	1991	1990	% chg
Biedermann, Asuncion(NE)	5.9		
Centrum Ogilvy & Mather, Bogota(MN)	9.9		
Corpa, Caracas(MN)	77.4		
Modemobile Mega Publicidad, Panama City(MN)	2.0		
Modemobile Publicidad, Guatemala City(MN)	1.3		
Modemobile Publicidad, San Salvador(NE)	8.3		
Northcoast Ogilvy & Mather, Santiago(MN)	12.8		
Ogilvy & Mather, Buenos Aires(MJ)	39.3		
Panamericana Ogilvy & Mather, Mexico City(MJ)	42.5		
Punto Publicidad, Montevideo(NE)	11.4		
Standard Ogilvy & Mather, Sao Paulo(MJ)	139.8		
Veritas/Ogilvy & Mather, Guayaquil(NE)	16.2		

Other offices
Ogilvy & Mather, Toronto(MJ) 159.9
Ogilvy & Mather, Nairobi(MJ) 6.1
Ogilvy & Mather, Rightford, Cape Town(MN) 133.8
Notes: Ogilvy & Mather Worldwide is a consolidation of the O&M Worldwide agency network, Cole & Weber, Thomson-Leeds, O&M Public Relations and O&M Direct, which includes A. Eicoff & Co. and O&M Yellow Pages.
Officers: Graham Phillips, chmn-ceo; Jerome Pickholz, vice chmn; Peter Scarperi, exec vp-cfo; Julian Clopet, pres-N. Amer.; Harry Reid, chmn-Europe; Rod Wright, regional dir-Asia.

Flavio Correa, pres-Latin Amer.

Headquarters: Ogilvy & Mather Worldwide/Worldwide Plaza/309 W. 49th St./New York, N.Y. 10019/Phone: (212) 237-4000

Cole & Weber

U.S.	1991	1990	% chg
Gross income	\$9.5	\$10.4	-8.6
Volume	\$83.2	\$83.0	0.3
Employees	118	122	-3.3
Offices	2	2	0.0

U.S. offices
Cole & Weber, Seattle 76.7
Cole & Weber, Portland, Ore. 6.5

Officers: Mark McNeely, chmn; Scott Marshall, president.
Headquarters: Cole & Weber/308 Occidental Ave. S./Seattle, Wash. 98104/Phone: (206) 447-9595

Thomson-Leeds

U.S.	1991	1990	% chg
Gross income	\$1.8	\$1.2	48.2
Volume	\$12.3	\$8.3	48.2
Employees	NA	NA	NA
Offices	1	1	0.0

Officer: Douglas Leeds, pres-ceo.
Headquarters: Thomson-Leeds/450 Park Ave. S./New York, N.Y. 10016/Phone: (212) 679-6700

Ogilvy & Mather Direct

Consolidated returns (\$ in millions)

Worldwide	1991	1990	% chg
Gross income	\$117.5	\$116.2	1.1
Volume	\$797.0	\$815.8	-2.3
Employees	1,266	1,385	-8.6
Offices	56	48	16.7
U.S.	1991	1990	% chg
Gross income	\$51.6	\$50.7	1.8
Volume	\$344.1	\$388.2	-11.4
Employees	490	518	-5.4
Offices	10	8	25.0

Officers: Jerome Pickholz, chmn; Stanley Winston, U.S. exec creative dir; Howard Lechuk, exec media dir.
Headquarters: Ogilvy & Mather Direct/309 W. 49th St./New York, N.Y. 10019/Phone: (212) 237-6000

A. Eicoff & Co.

U.S.	1991	1990	% chg
Gross income	\$12.5	\$12.9	-3.1
Volume	\$99.9	\$103.0	-3.0
Employees	114	120	-5.0
Offices	1	1	0.0

Officer: Ronald L. Blisw, pres-ceo.
Headquarters: A. Eicoff & Co./401 N. Michigan Ave./Chicago, Ill. 60611/Phone: (312) 527-1100

Ogilvy & Mather Yellow Pages

U.S.	1991	1990	% chg
Gross income	\$1.7	\$1.6	5.7
Volume	\$11.2	\$10.6	5.7
Employees	10	10	0.0
Offices	1	1	0.0

Officer: Charles Guariglia, sr vp-gm.
Headquarters: Ogilvy & Mather Yellow Pages/427 Bedford Rd./Pleasantville, N.Y. 10570/Phone: (914) 769-0827

Scali, McCabe, Sloves

Consolidated returns (\$ in millions)

Worldwide	1991	1990	% chg
Gross income	\$31.1	\$102.5	-11.1
Volume	\$631.1	\$694.8	-9.2
Employees	1,089	1,172	-7.1
Offices	15	17	-11.8
U.S.	1991	1990	% chg
Gross income	\$58.5	\$66.4	-11.9
Volume	\$409.6	\$454.2	-9.8
Employees	590	627	-5.9
Offices	7	8	-12.5

European offices
Audeart, Sorn, Larue/SMS, Paris(MJ) 49.9
Hildmann, Simon, Rempert & Schmitz/SMS, Dusseldorf(MJ) 105.2
Kasper, Koets, Burger & deRoos/SMS, Amsterdam(MJ) 22.6
Rileva Zamorana Rodriguez, Madrid(MJ) 40.2
Latin American offices
Futura/SMS, Sao Paulo(MJ) 14.6
SMS de Mexico, Mexico City(MJ) 43.3
Canadian offices
SMS-Canada, Toronto/Vancouver(MJ) 35.0
Notes: SMS is a consolidation of Fallon McElligott (80% equity), Morton Goldberg Associates and The Martin Agency (85%), the latter including the Stenrich Group. SMS sold its equity in Abbott, Mead, Vickers, London, in 1991.

Officers: Marvin Sloves, chmn-ceo; Alan Jurmain, exec vp.
Headquarters: Scali, McCabe, Sloves/800 Third Ave./New York, N.Y. 10022/Phone: (212) 735-8000

Fallon McElligott

U.S.	1991	1990	% chg
Gross income	\$16.6	\$12.9	29.2
Volume	\$126.1	\$97.1	29.9
Employees	150	147	2.0
Offices	1	1	0.0

Officer: Pat Fallon, chmn.
Headquarters: Fallon McElligott/901 Marquette Ave., Suite 3200/Minneapolis, Minn. 55402/Phone: (612) 332-2445

Morton Goldberg Associates

U.S.	1991	1990	% chg
Gross income	\$2.2	\$2.2	NA
Volume	\$13.9	\$14.4	-3.3
Employees	13	13	0.0
Offices	1	1	0.0

Officer: Morton C. Goldberg, pres.
Headquarters: Morton Goldberg Assoc./350 Park Ave./New York, N.Y. 10022/Phone: (212) 752-3552

The Martin Agency

U.S.	1991	1990	% chg
Gross income	\$23.7	\$23.3	1.6
Volume	\$158.0	\$155.5	1.6
Employees	175	175	0.0
Offices	3	4	-25.0

Notes: Martin includes returns from Stenrich Group.
Officer: John Adams, pres.
Headquarters: The Martin Agency/500 N. Allen

Ave./Richmond, Va. 23220/Phone: (804) 254-3400

Stenrich Group

U.S.	1991	1990	% chg
Gross income	\$6.3	\$5.5	15.6
Volume	\$42.0	\$36.3	15.6
Employees	71	57	24.6
Offices	1	1	0.0

Officer: Steven R. Isaac, chmn-ceo.
Headquarters: Stenrich Group/10128 W. Broad St., Suite J/Glen Allen, Va. 23060/Phone: (804) 747-1202

J. Walter Thompson Co.

Consolidated returns (\$ in millions)

Worldwide	1991	1990	% chg
Gross income	\$727.0	\$690.7	5.3
Volume	\$5,048.8	\$4,852.3	4.0
Employees	6,695	6,837	-2.1
Offices	211	199	6.0
U.S.	1991	1990	% chg
Gross income	\$272.5	\$285.2	-4.5
Volume	\$1,919.0	\$2,010.7	-4.6
Employees	2,317	2,449	-5.4
Offices	62	66	-6.1

U.S. offices
J. Walter Thompson USA, Atlanta 60.0
J. Walter Thompson USA, Detroit 482.0
J. Walter Thompson USA, New York 535.0
J. Walter Thompson USA, Chicago 350.0
J. Walter Thompson USA, San Francisco 238.0

African offices	1991	1990	% chg
J. Walter Thompson Co., Sandton(MN)	22.0		
TMI, Cairo(NE)	3.6		
TMI, Jeddah(NE)	18.1		
TMI, Dubai(NE)	10.1		
TMI, Beirut(NE)	3.3		
TMI Cinemaps, Casablanca(NE)	6.4		

Asian offices
Ad Force-JWT, Jakarta(NE) 22.6
Asiatic Advertising, Karachi(NE) 4.0
Contract Advertising, Bombay(MN) 13.6
Hindustan Thompson Associates, Bombay(NE) 97.9
J. Walter Thompson Australia, Sydney(MJ) 70.8
J. Walter Thompson Co., Taipei(MJ) 36.1
J. Walter Thompson Co., Bangkok(MJ) 21.6
J. Walter Thompson Co., Manila(MJ) 22.0
J. Walter Thompson Co., Kuala Lumpur(MJ) 19.4
J. Walter Thompson Japan, Tokyo(MJ) 224.0
J. Walter Thompson Korea, Seoul(MJ) 10.1
J. Walter Thompson NZ, Wellington(MJ) 16.9
J. Walter Thompson Singapore, Singapore(MJ) 28.0
Thompson Lanka, Colombo(MN) 4.0

European offices	1991	1990	% chg
DDFH & B Advertising, Dublin(MN)	11.4		
Haupt-Stummer/J. Walter Thompson, Vienna(MJ)	43.6		
J. Walter Thompson, Brussels(MJ)	45.3		
J. Walter Thompson, Copenhagen(MJ)	20.0		
J. Walter Thompson, Levallois-Perret(MJ)	152.0		
J. Walter Thompson Co., Frankfurt(MJ)	721.5		
J. Walter Thompson Co., London(MJ)	269.0		
J. Walter Thompson Co., Zurich(MJ)	29.4		
J. Walter Thompson Co., Madrid(MJ)	289.1		
J. Walter Thompson Co., Bangkok(MJ)	22.1		
J. Walter Thompson Italia, Milan(MJ)	307.6		
J. Walter Thompson Publicidade, Lisbon(MJ)	65.5		
J. Walter Thompson-Finland Oy, Helsinki(MN)	17.7		
Manajays-Thompson, Istanbul(MJ)	37.4		
PPGH-JWT Group, Amsterdam(MJ)	146.1		
Schjerveen/J. Walter Thompson, Oslo(NE)	12.1		
Spot-Thompson Advertising, Athens(MN)	64.1		

Latin American offices
APCU de Costa Rica, San Jose(NE) 2.4
APCU de Honduras, Tegucigalpa(NE) 0.5
APCU de Nicaragua, Managua(NE) 0.6
APCU de Panama, Panama City(NE) 3.1
APCU El Salvador, San Salvador(NE) 3.1
APCU Thompson Asociados, Guatemala City(MN) 3.5
Atlas Publicidad, Bogota(NE) 14.9
Azcar, Morrison, Walker, Santiago(MN) 18.9
CBRA Propaganda, Sao Paulo(MJ) 20.1
Corporacion Thompson, Montevideo(NE) 7.0
de la Cruz & Associates, Hato Rey(MN) 17.6
J. Walter Thompson, Asuncion(MJ) 1.0

Canadian offices	1991	1990	% chg
J. Walter Thompson Co., Toronto(MJ)	269.0		
J. Walter Thompson Co., Montreal(MJ)	29.4		
J. Walter Thompson Co., Vancouver(MJ)	289.1		
J. Walter Thompson Co., Winnipeg(MJ)	22.1		
J. Walter Thompson Italia, Milan(MJ)	307.6		
J. Walter Thompson Publicidade, Lisbon(MJ)	65.5		
J. Walter Thompson-Finland Oy, Helsinki(MN)	17.7		
Manajays-Thompson, Istanbul(MJ)	37.4		
PPGH-JWT Group, Amsterdam(MJ)	146.1		
Schjerveen/J. Walter Thompson, Oslo(NE)	12.1		
Spot-Thompson Advertising, Athens(MN)	64.1		

U.S. offices	1991	1990	% chg
J. Walter Thompson Co., New York	535.0		
J. Walter Thompson Co., Chicago	350.0		
J. Walter Thompson Co., San Francisco	238.0		
J. Walter Thompson Co., Atlanta	60.0		
J. Walter Thompson Co., Detroit	482.0		
J. Walter Thompson Co., New York	535.0		
J. Walter Thompson Co., Chicago	350.0		
J. Walter Thompson Co., San Francisco	238.0		
J. Walter Thompson Co., Atlanta	60.0		
J. Walter Thompson Co., Detroit	482.0		

U.S. offices	
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European offices	
Young & Rubicam Italia, Milan(MJ)	457.7
Young & Rubicam Poland, Warsaw(NA)	0.0
Young & Rubicam Turkey, Istanbul(MJ)	22.0
Young & Rubicam U.K., London(MJ)	600.8
Y&R Czechoslovakia, Prague(NA)	4.9
Latin American offices	
Azer Publicidad/Y&R, Bogota(MN)	15.9
Eco Publicidad, Guatemala City(NE)	1.5
F&D/Young & Rubicam, Buenos Aires(MN)	52.5
JMC Creatividad Orientada Y&R, Caracas(MJ)	32.2
Vice Versa/Young & Rubicam, Montevideo(NE)	3.8
Young & Rubicam, Mexico City(MJ)	38.3
Young & Rubicam Damaris, Santo Domingo(MJ)	12.5
Young & Rubicam de Chile, Santiago(MJ)	5.2
Young & Rubicam do Brasil, Sao Paulo(MJ)	72.5
Young & Rubicam Puerto Rico, Guaynabo(MJ)	31.9

Canadian offices

Young & Rubicam, Toronto(MJ)	376.0
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Notes: The difference between organization figures of Y&R the holding company and consolidated numbers for Y&R the agency is the treatment of Burson-Marsteller. The holding company claims 100% of returns for B-M, a marketing services company, while Y&R the agency claims two-thirds, or the media-only portion, of B-M. AA omits non-media activity from consolidated agencies. A 50% share of Dentus, Young & Rubicam Partnerships, which in the U.S. includes Lord, Dentus & Partners, New York, and Bowes Dentus & Partners, is in Y&R returns. Figures also include Dentus/Burson-Marsteller USA, New York, 51% of D/B-M, Tokyo, and 50% each of Russian Ventures and DWD Japan. Y&R's specialized shops included are CMF&Z, Cedar Rapids, Iowa, Sive Y&R, Cincinnati, Landor, San Francisco, and in New York, Sudler & Hennessey, Chapman Direct, Arbet/DBR, Cato Johnson Worldwide and Wunderman Worldwide. The latter two merged early this year, but their numbers remain separate in this report.

Officers: Alex Kroll, chmn-coo, Peter Georgescu, pres; Joe De Deo, vice chmn-chief creative officer; R. John Cooper, exec vp-genl counsel.

Headquarters: Young & Rubicam/285 Madison Ave./New York, N.Y. 10017/Phone: (212) 210-3000

Cato Johnson Worldwide			
Worldwide	1991	1990	% chg
Gross income	\$62.3	\$63.6	-2.1
Volume	\$423.6	\$417.9	1.4
Employees	671	671	0.0
Offices	23	22	4.5
U.S.			
1991	1990	% chg	
Gross income	\$23.9	\$28.2	-15.1
Volume	\$159.5	\$191.6	-16.8
Employees	284	313	-9.3
Offices	5	5	0.0
U.S. offices			
Cato Johnson, New York	50.0		
Cato Johnson, Chicago	24.8		
Cato Johnson, Detroit	2.7		
Cato Johnson, Rochester, N.Y.	64.8		
Cato Johnson Wilk, Chicago	17.2		

Officers: Jean-Paul Lafaye, coo, Brian Harris, chmn.

Headquarters: Cato Johnson Worldwide/675 Avenue of the Americas, 3rd Fl./New York, N.Y. 10010/Phone: (212) 941-3700

Chapman Direct			
U.S.	1991	1990	% chg
Gross income	\$17.0	\$15.0	13.1
Volume	\$113.2	\$100.1	13.1
Employees	113	120	-5.8
Offices	1	1	0.0

Officers: William P. Sutherland, pres-coo.

Headquarters: Chapman Direct/230 Park Ave. South/New York, N.Y. 10003/Phone: (212) 614-3680

Sudler & Hennessey			
Worldwide	1991	1990	% chg
Gross income	\$40.8	\$39.5	3.3
Volume	\$275.7	\$267.3	3.1
Employees	342	353	-3.1
Offices	10	10	0.0
U.S.			
1991	1990	% chg	
Gross income	\$27.6	\$26.0	6.0
Volume	\$183.8	\$173.4	6.0
Employees	223	229	-2.6
Offices	2	2	0.0

Officers: William B. Gibson, chmn-pres-coo, John Chervakas, exec vp-chief creative officer, Thomas Crotty, exec vp-treasurer, Neil Leiner, exec vp-group dir, communications evcs.

Headquarters: Sudler & Hennessey/1633 Broadway/New York, N.Y. 10019/Phone: (212) 969-5800

Wunderman Worldwide			
Worldwide	1991	1990	% chg
Gross income	\$85.0	\$85.0	-0.1
Volume	\$577.2	\$267.0	116.2
Employees	854	958	-10.9
Offices	35	29	20.7
U.S.			
1991	1990	% chg	
Gross income	\$36.2	\$38.1	-5.1
Volume	\$241.4	\$254.4	-5.1
Employees	324	377	-14.1
Offices	3	4	-25.0

U.S. offices

Wunderman Worldwide, Detroit 32.5

Wunderman Worldwide, New York 191.5

Wunderman Worldwide, San Francisco 12.6

Wunderman Worldwide, Little Rock, Ark. 4.9

Officers: Lester Wunderman, chmn; John Sanders, pres-coo, Mitch Kurz, chmn-N. Amer. Steve Eckels, pres-Europe.

Headquarters: Wunderman Worldwide/675 Avenue of the Americas/New York, N.Y. 10010/Phone: (212) 941-3000

Staff for this report

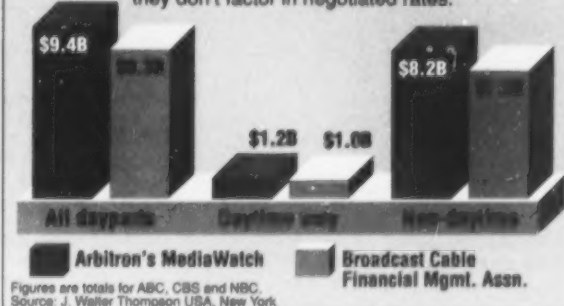
Fred Danzig, Dennis Chase, Larry Edwards, R. Craig Endicott, Kevin Brown, Ilse Cermak, Kathy Welyki, Nancy Giges, Julie Skur Hill, Geof Shives, Richard K. Skews, William Spain, Debra Aho.

Index to U.S.-based agency brands by rank

Brand name agency	Rank	Brand name agency	Rank	Brand name agency	Rank
Abelson-Taylor	204	DK Group	505	Kinzie & Green	486
Ackerman Hood & McQueen	143	Doe-Anderson Advertising	251	Klemmer Advertising	55
AC&R Advertising	75	W.B. Doner & Co.	34	Kobs & Draft	63
Adair-Greene Advertising	430	Doremus & Co.	128	Kobs Gregory & Passavant	397
Adams & Longino Advertising	517	Dorland Sweeney Jones	199	Kocs, Wesson & Associates	481
Adelante Advertising	446	Edward G. Dorn & Associates	371	Kolon, Bittker & Desmond	208
Adler Boschetto Peablies & Partners	216	Dorrite Lyons & Nickel	144	Kopf Zimmermann Schulteis	417
Admarketing	27	Douglas Samuel Advertising	400	Korey Kay & Partners	163
Ad-Pro	472	D.P.L. Advertising	366	Kresser Craig D.I.K.	110
Ad Team	215	Dudnyk Co.	320	Kuhn & Wittenborn	317
Adteam	519	Dudrick DePaul Ficco & Morgan	358	Kupper Advertising	291
Ad-Tech Communications	361	G. Duff Associates	482	Kurtzman/Slavin/Linda	441
Advertising Works	272	Duffy & Shanley	283	Lally, McFarland & Pantello	146
Advertising, Boelter & Lincoln	367	Dugan Farley Communications	152	Landers & Partners	439
Ally & Gargano	38	A. Eicoff & Co.	118	Hal Langerman Co.	365
Amnirah & Puns	41	Edison Speer Watson & Dickerson	401	Lardis, McCurdy & Co.	456
Anderson & Lemke	140	Esaman, Johns & Laws	178	Larkin, Meeder & Schwei	224
Donald I. Arends Inc.	411	Esner & Associates	178	Launey, Hachmann & Harris	389
Anon. Lowe & Travis Advertising	296	Erman Advertising & PR	186	Laurer Markin Gibbs	289
Arnold Fortuna Lane & Co.	116	Ericson Marketing Communications	192	Laurey Wolff-Swift	69
David Arnold Design	527	Evans Communications	52	Laurence, Charles, Free & Lawson	39
Asatsu America	442	Exclamation Point Advertising	496	Al Paul Lefton Co.	153
Asbury Dillon	494	Fahlgren Martin	70	Leslie Advertising Agency	274
Asher Gould Advertising	131	Falcone & Associates Marketing Communications	357	Lessing-Flynn Advertising Co.	443
Avrett, Free & Ginsberg	44	Fallon McElligott	96	Letven/Dicicco	331
N.W. Ayer	20	FCB Direct U.S.	45	Jack Levy Associates	136
Babbitt & Reiman Advertising	217	Ferguson Communications Group	36	Lewis Communications	355
Backer Spielvogel Bates Worldwide	12	Fingerote & Fingerote	507	Lewis & Gace	134
Bader Rutter & Associates	158	Finnegan & Agee	306	Lieberman-Appalucci	340
Bailey Klepinger & Medrich	318	Fitzgerald & Co.	312	Liggett-Stashower	127
Bailey Lauerman & Associates	362	FitzSimons Advertising & PR	476	Lintas Marketing Communications	31
Gordon Bailey & Associates	236	FKO Advertising	339	Lintas Worldwide	14
Perry Ballard-advertising	462	Fletcher, Gampner & Wirth	363	Lipman, Richmond, Greene	337
Barbeau-Hutchings Advertising	483	Floath Johnson Associates	228	Littelfield Marketing & Advertising	436
Bar-Dei & Associates	530	Gogarty & Klein-Winns Brandon	122	Lockhart & Pettus	272
Barthel Advertising & PR	295	Gord Group	238	Loeffler Ketchum Mountjoy	325
Baxter, Gurian & Mazzei	235	Footle, Cone & Belding Communications	5	Loss-USA	42
Bayer Bess Vanderwerker	79	Forsythe Marcelli Johnson	277	Long, Haymes & Carr	114
BBDO Worldwide	433	Fotheringham & Associates	360	Lord, Dentus & Partners	80
BBK	433	Albert Frank-Guenther Law	220	Lord, Sullivan & Yoder	247
Beaumont, Heller & Sperling	431	Frankenberry, Laughlin & Constable	137	Lortz Direct Marketing	424
Beckman Meany	415	Frankfurt Gips Balkind	113	Lotas Minsard Patton McIver	243
BelMed Advertising	346	Frederick Studio	524	Louis London	294
Bender, Browning, Dolby & Sanderson	248	Cliff Freeman & Partners	120	Lowe & Partners	29
Walter Bennett Communications	269	Fruchman & Rosen	503	Lyons Inc.	299
Bentley, Barnes & Lynn	171	Furman Roth Advertising	423	MacNamara, Klein & Solin	196
Berenson, Isham & Partners	379	Gardner Communications	333	J. Malek Inc.	352
Berenter Greenhouse & Webster	150	Garon Hoffman Conlon & Nye	253	Mandelbaum Mooney Ashley	303
Lou Beres & Associates	374	Geer, DuBois	76	MARC Advertising	148
Berline Group	241	Geoghegan/Griffiths	453	Marcus Advertising	229
Bernstein-Rein Advertising	92	Gerber Advertising	276	Margules Fertitta & Weiss	529
Berry Network	53	Gerbig, Snel-Wedemeyer & Associates	384	Mars West & Baker	347
William R. Biggs/Gilmore Associates	194	Gibbons & Dickens	406	Marken Communications	506
George Blake & Associates	522	Gigante Vaz & Partners	341	Marketing Group	427
Barry Blau & Partners	82	Gilbert, Whitney & Johns	212	Marketing Resources of America	191
Bloom FCA	74	Girgenti, Hughes, Butler & McDowell	123	Marketing Support	261
Carl Bloom Associates	461	Daniel Glassman Advertising	434	Marontate & Co.	449
Bonneville Communications	234	Glendon & Co.	259	Marquardt & Roche	235
Borders, Perrin & Norrander	183	Goldberg Moser O'Neill	119	Mars Advertising	182
Bowes Dentus & Partners	103	Morton Goldberg Associates	356	Martin Marshall Jaccoma Mitchell	160
Bozell	13	Goldfarb Hoff & Co.	313	Martin-Williams Advertising	108
Brady Company	335	Goody, Berlin & Silverstein	86	The Martin Agency	90
Brashe Advertising	485	Goodwin, Dannenbaum, Littman & Wingfield	142	Martz & Wadas	422
Brenley & Partners	205	Grace & Rothschild	345	McAdams, Richman & Ong	184
R.F. Brudus & Associates	403	Graft Advertising	130	William Douglas McAdams	58
Brouillard Communications	148	Grant Advertising	475	McAndrew Advertising Co.	528
Earle Palmer Brown Gos	26	Grant Marketing Communications	201	McCauley & McCall	33
E.H. Brown Advertising	332	Gray Baumgarten Layport	405	McCann Direct	185
Bryan, Brown & Malinsky	387	Gray Kirk-Van Sant Advertising	139	McCann-Healthcare	255
Buntin Advertising	193	Greenstone Roberts Advertising	159	McCann-Erickson Worldwide	297
David K. Burnap Advertising	375	Grey Advertising	3	McCormick Advertising	393
Leo Burnett Co.	1	Griffin Bacal	67	McDougall Associates	202
Burrell Communications Group	156	Griswold	176	McFarland & Drier	226
Burns Agency	429	Grob & Co.	466	McKinney & Silver	112
Lawrence Butler Advertising	257	Gross Townsend Frank Hoffman	100	McKone & Co.	324
Cabot Communications	115	GS&B Lintas	298	M.E.D. Communications	99
Cadwell Davis Partners	105	GSD&M	73	Medicus Intercom International	46
Calet, Hirsch & Spector	94	GS Marketing Services	169	Meldrum & Fawcett Communications	87
Campbell Group	326	Gumpertz Bentley-Fried	301	Mendoza, Dillon & Associates	179
Campbell & Wagman	262	Vinod Gupta Advertising Co.	432	Stan Merritt Inc.	271
Campbell-Mithun-Esly	15	Haddon Advertising	315	Messner Veters Berger Carey Schmetterer	50
Carmichael Lynch	102	Hakuhodo Advertising America	187	Meyer & Wallis	342
Carrifello-Drehi & Associates	162	Halblich-Beggs	425	Meyocks Benksstein Associates	407
Carrat Waxman Advertising & PR	419	Hallmark Advertising	288	M&H Advertising	343
Cascino Purcell Freebairn	402	Hameroff Milenthal-Spence	189	Michael & Partners	316
Cato Johnson Worldwide	60	Hamilton, Carver & Lee	125	Miller Meester Advertising	170
CDHM Advertising	351	Harant Soghian Marketing	426	Mills Marketing	525
Chapman Direct	93	Harmon Smith	370	William Mills Agency	509
CHC Advertising	207	Harris Advertising	421	Mintz & Hoke	214
Chernoff Silver & Associates	239	Harris & Love	329	Morris Direct Marketing	531
Chat Day Mojo	19	Harris-Drury-Cohen	219	Eric Mower & Associates	138
Clarion Marketing & Communication	51	Harrison, Star, Wiener & Beiler	180	MSA Advertising	498
Clarity Coverdale Ruff Advertising	280	Harris, Bao & McCullough	323	Mullen Advertising	109
Clarke Advertising & PR	510	Haseloff & Associates	400	MWA Direct	495
George P. Clarke Advertising	460	Haynes & Pittenger Direct	477	Nationwide Advertising Service	56
Cline, Davis & Mann	133	Henderson Advertising	145	Nett & Associates	500
Cosling Heagerty Cos	435	Hicks & Associates	521	Nelson Communications	181
Cohen Johnson	209	Hicks & Associates	521	Nemer, Feger & Associates	428
Cohn & Wills	161	Roni Hicks & Associates	396	New England Advertising Associates	344
Cole & Weber	147	Hiebing Group	408	Newmark, Posner & Mitchell	302
Colie & McVoy	174	Hill, Holliday, Connors, Cosmopolis	24	NK&W	321
Communicators Group	459	Hinton & Steel	484	Noble Communications	117
Concepts & Strategies	501	Hitchcock-Fleming & Associates	284	Nordensson Lynn & Associates	458
Conill Advertising	258	Hively Agency	390	Bruce Novograd Advertising	511
William Cook Agency	141	Bernard Hodes Group	61	NPC & Associates	520
Frank J. Corbett Inc.	121	Hoffman, York & Compton	222	Ogilvy & Mather Direct	35
Corcillo Direct	513	Hoffman-Lewis	307	Ogilvy & Mather Worldwide	6
Cosmopolis Crowley Daly CKG	281	J.P. Hogan & Co.	438	Ogilvy & Mather Yellow Pages	394
Cox Landey & Partners	225	Houston, Effler & Partners	195	Omon New York	310
Cramer-Krasselt	83	R.J. Hunter & Associates	497	Opus Group	490
Cranford-Johnson Robinson Woods	206	ICE Communications	290	Orlando Marketing	368
Creative Alliance	444	IMPACT	124	Pagano Schenck & Kay	334
Creative Concepts in Advertising	444	Imms Quenne & Johnson	101	Paige Smith Group	418
Creative Direct Response	399	Inns Maggiore Group	488	Paolin & Sweeney	263
Greel Associates	516	Integrated Advertising & Communications	514	Partners & Shevack	95
Cronin & Co.	373	Intersouth Creative Group	515	Patterson Advertising Agency	464
CTS Advertising	504	Jason Group	330	Peck Sims Mueller	273
Dahl Smith White	167	Jayne Organization	305	Pedone & Partners	200
Daley & Associates	65	Jioly Communications	478	Penny & Speier	382
Dana Communications	385	Rick Johnson & Co.	353	Penny-Ohlmann-Neiman	381
D'Arcy Masius Benton & Bowles	10	Jordan Tamraz Caruso Advertising	203	Pettus Advertising	489
Davis Ball & Colombario	88	Jordan, McGrath, Case & Taylor	32	Philips, Gianettino & Meredith	452
DDO Needham Worldwide	11	Juhl Marketing/Communications	286	Phillips Miller Speyer & Frost	388
Decker Rickard	363	Kallir, Phillips, Ross	62	Phoenix Advertising	470
Delta Femina, McNamee	18	Karsh & Hagan	230	Pierce-Davis & Associates	457
Dentsu America	129	Austin Kelley Advertising	198	Pierson & Flynn	376
Detroit & Underwood	468	Keller Haver Lipman	523	Pondexter Associates Advertising	479
Devon Direct Marketing & Advertising	107	Keller-Crescent Co.	58	Polsky Clancy	474
DFK Advertising	493	Keroff & Rosenberg Advertising	266	Pollak Levitt Chaei Advertising	412
Dickson & Hendee Advertising	508	Ketchum Communications	16	Poppe Tyson	177
DIMAC Direct	25	Keyes Martin & Co.	155	Praco	467
Direct Marketing Group	97	Kingswood Advertising	309	Publicis	210

Network ad revenue reports vary

Arbitron's MediaWatch figures are higher because they don't factor in negotiated rates.



Network revenues down for '91—but how much?

NEW YORK—While Arbitron Co. reports 1991 ad revenues on the Big 3 TV networks fell 6.7% to \$9.46 billion, the true level is about 12% lower than that, according to an analysis by J. Walter Thompson USA.

JWT compares Arbitron's MediaWatch findings with data from the Broadcast Cable Financial Management Association, which estimates 1991 ad revenues of \$8.33 billion.

While MediaWatch relies on estimates provided by the networks, the association's data are derived from the networks' unaudited submissions to accountants Ernst & Young.

MediaWatch inflates network revenues because it doesn't factor in negotiated rates or packages, and counts make-good units at regular ad rates, JWT reports.

While the absolute dollar amounts vary, JWT notes the relative shifts are about the same: "Both concluded that overall 1991 network revenues fell about 6% below 1990 levels and that daytime revenues exhibited little change from the prior year." □

LAUNCHING PAD

New publication launches.

'Good Housekeeping's Living Well'

Hearst Magazines, in a joint venture with the American Medical Association, is testing with a spring issue *Good Housekeeping's Living Well*, a family-oriented health magazine. Portions of the magazine were published in the March issue of *Good Housekeeping*. A second test issue will be published in September. *Living Well* has a rate base of 100,000 and will be sold on newsstands and distributed through doctors' offices. A b&w page is \$6,700 and a color page is \$10,000. *Good Housekeeping* Publisher Alan Waxenberg is publisher, Michael Segell is editor and John H. Grant Jr. is associate publisher-advertising. Offices are at 959 Eighth Ave., New York 10019. Phone: (212) 649-2000.

'Where San Francisco'

Where Magazine International introduces with a July issue *Where San Francisco*, a monthly distributed through 60 local hotels. Similar titles are pub-

lished in 18 cities. Controlled circulation is 50,000. A b&w page is \$2,550; a color page is \$3,000. Patricia Varga is publisher and ad director; Christin Loudon is editor. Offices are at 90 New Montgomery St., Suite 210, San Francisco 94105. Phone: (415) 456-6101.

'Building Renovation'

Penton Publishing introduces



with a September issue *Building Renovation*, targeting contractors, building owners, developers and architects. The every-other-monthly will be a sister publication to Penton's *Progressive Architecture*. Controlled circulation is 45,000. A b&w page is \$5,500; a color page is \$7,000. Richard Strachan is publisher and ad director; Thomas Fisher is editorial director. Office are at 600 Summer St., Stamford, Conn. 06904. Phone: (203) 348-7531.

'On Production'

On Production Inc. introduced with a March issue *On Production*, an every-other-monthly targeting film and video production and post-production companies. Editorial covers feature films, TV, commercials, music videos and corporate communications. Rate base is 13,000. A b&w page is \$1,567; a color page is \$2,475. Howard Kunin is publisher, editor and West Coast ad director; Mitchell Hall is ad sales account executive-East Coast. Offices are at 1733 Ventura Blvd., Suite 226, Encino, Calif. 91316. Phone: (818) 907-6682. □

NEWSTAND

Advertising opportunities in print.

I.D. Magazine, New York, "I.D. annual design review" special editorial section, July/August issue; ad close: May 20. B&w page: \$2,970; color page: \$3,965.

Sports Illustrated, New York,

"Summer Olympic preview" special ad section, July 22 issue; ad close: May 25. Color page: \$145,000.

Good Housekeeping, New York, "Guide to parenting" special ad section, Sept. issue; ad close: June 5. B&w page: \$97,260; color page: \$122,035.

McCall's, New York, "McCall's on men" special edition, November issue; ad close: Aug. 14. B&w page: \$70,615; color page: \$83,315. □

Joe Mandese coordinates MediaWorks.

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WHERE THE WORLD GETS THE WORD
On Marketing

Outdoor weathers '91 with stable spending

By Alison Fahey

Outdoor advertising came through 1991 in better shape than other media, seeing spending fall just 0.7% to \$684 million.

The size of the decline, as reported by LNA/Arbitron Multi-Media Service, was welcome news for the industry. Some outdoor executives had feared 1990's hefty 2.4% decline, the biggest nose dive in at least a decade, would carry into 1991.

LNA reported bigger slides for other media, including network TV (off 6.7% to \$9.45 billion), newspapers (down 23.1% to \$6.8 billion) and network radio (down 24.5% to \$578.7 million).

Spending "was flat in 1991 and, given the significant declines in other media, I think flat is a pretty good performance," said James Keller, VP-marketing at Gannett Outdoor Group, a leading outdoor company.

"In an overall down advertising industry, we've remained relatively flat, which is sort of like an increase," said Gordon Hughes, president of OAAA Marketing, a division of the Outdoor Advertising Association of America.

Mr. Hughes cited the entertainment category as one of the bright spots in the industry. Advertisers in that category increased spending about 12% to \$53 million (see chart).

Among the top 10 outdoor categories, six showed declines, with the most notable drops coming from the retail, publishing and media, and insurance and real es-

tate categories.

That's no surprise, considering each has been hit hard by the economic and/or media recessions.

One surprising finding showed tobacco-related advertisers increased outdoor spending 1.2% to \$184.9 million.

The increase seemed odd because outdoor spending by those marketers has been falling for years and the outdoor industry had already voluntarily implemented restrictions on where tobacco- and alcohol-related product marketers could run their

boards.

Mr. Keller questioned the LNA gain for tobacco-related products. The outdoor industry has questioned the accuracy of LNA figures and is working with its members and LNA to improve the situation.

As for the future, Mr. Keller said new spending from non-traditional advertisers would offset losses such as R.J. Reynolds Tobacco Co.'s planned outdoor spending cuts. He cited a recent buy by McDonald's Corp., the marketer's first major national outdoor campaign, as an

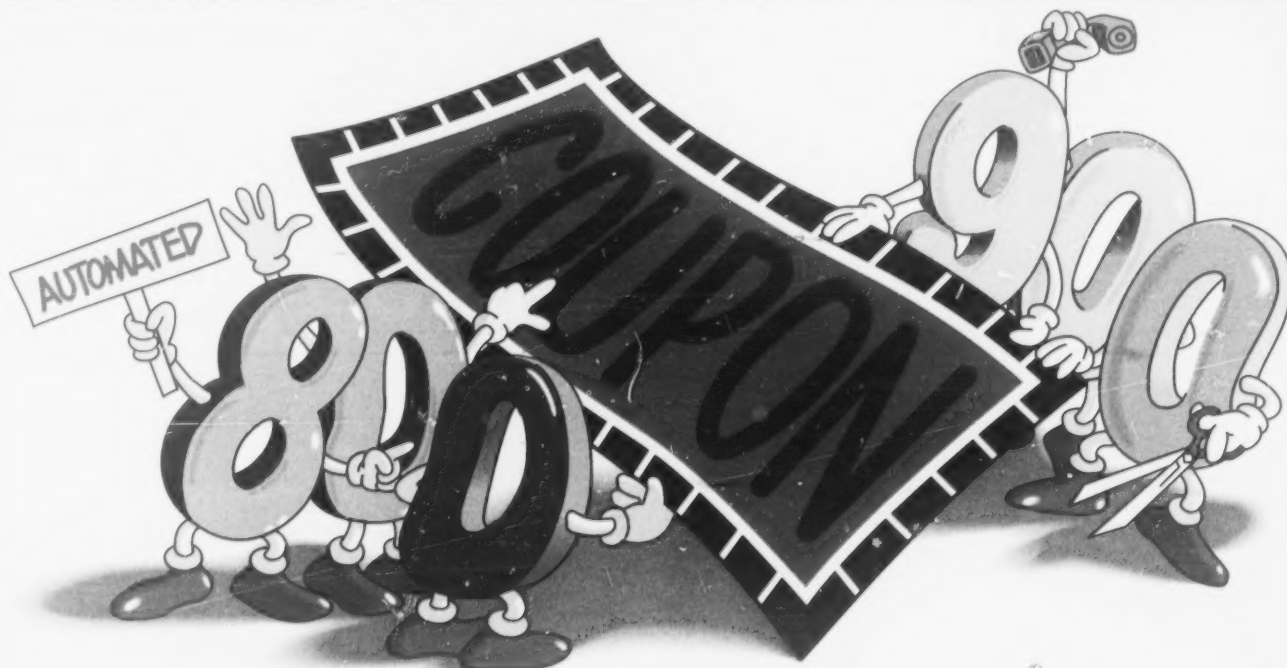
Top 10 outdoor categories			
Category	1990 spending (millions)	1991 spending (millions)	% chg
Cigarettes, tobacco & access.	\$182,834	\$184,862	1.2
Retail	68,871	62,930	-8.6
Business and consumer services	64,732	62,740	-3.1
Beer, wine, liquor	56,511	61,521	8.9
Entertainment & amusements	47,197	53,038	12.4
Automotive, access/equip.	53,010	51,864	-2.2
Travel, hotels and resorts	49,926	48,548	-2.8
Publishing & media	38,621	34,824	-10.3
Miscellaneous (not elsewhere classified)	25,141	32,702	30.1
Insurance & real estate	28,371	23,344	-17.7

Source: LNA/Arbitron Multi-Media Service

example.

Still, it remains to be seen whether the industry will ever re-

bound to 1988's record \$718.2 million. Outdoor ad spending has dipped every year since then. □



KGB vets spy deals

By Betsy McKay

MOSCOW—KGB agents don't die; they go to Hollywood.

A group of 500 retired spies, called the Foreign Intelligence Veterans Association, has signed a deal with the Entertainment & Communications Holdings Organization giving the Hollywood-based company exclusive rights to market some of the KGB's most hidden secrets to the entertainment world.

The organization will act as the agent for the ex-spies in selling movie and book rights to stories such as how the KGB obtained U.S. secrets about the atom bomb after World War II and Lee Harvey Oswald's relationship with the KGB. Mr. Oswald reportedly met with spy Oleg Nechiporenko two months before President Kennedy was killed.

"Profits will be divided in a fair and equitable fashion," said organization President-CEO Brian Litman. He declined to provide specifics on the commercial agreement.

Contrary to popular belief, the retired spies lead modest lives, said Anatoly Privalov, deputy chairman of the association, formed to provide financial and moral support to former spies.

"The idea that people in espionage are rich is a myth," he said.

The average pension for a former Soviet spy is between \$5 and \$10 a month, less than the average Russian worker's wage of \$9.60. □

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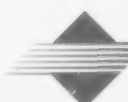
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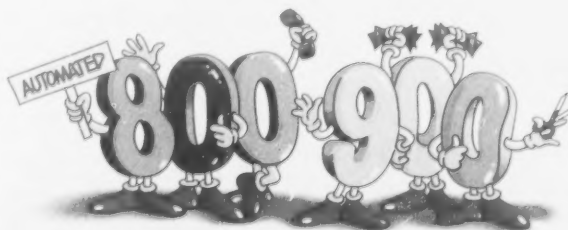
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FOR THE RECORD

THOMAS J. LIPTON INC., Englewood Cliffs, N.J., as expected, moved its \$30 million-plus tea business to **J. Walter Thompson USA**, New York, from Lintas: New York (AA, Feb. 17). The move consolidates all of the tea brand's advertising following JWT's win of the Pepsi/Lipton Tea Partnership, a joint venture that will market ready-to-drink teas.

BOB EVANS FARMS, Columbus, Ohio, will hear credentials presentations on its \$17.7 million account from Eire Partners, Noble & Associates and Tatham/RSCG, all Chicago; W.B. Doner & Co., Southfield, Mich.; and J. Walter Thompson USA, Detroit. The winner will succeed Campbell-Mithun-Esty, Chicago.

M&M/MARS is reducing wholesale prices by 9.4% on family packs of M&M's chocolate candies, its No. 1 selling brand. In addition, the candy marketer announced a major promotion, from May 3 to Oct. 15, giving consumers 5¢ back for wrappers from its candy or ice cream product lines. TV, radio and print ads from D'Arcy Masius Benton & Bowles, St. Louis, will support. "Bringing America change" is the theme.

FOOD AND CONSUMER groups sparred last week over whether the Food & Drug Administration should grant an industry-requested extension to the time frame for new food nutrition labeling. Consumer groups argued a one-year delay would lead to 10,000 cases of cancer and heart disease. The Grocery Manufacturers Association, which asked that the implementation date be delayed, denied the consumer groups' claims.

SEAGRAM SPIRITS & WINE Group created a separate unit, the Chivas & Glenlivet Division, to provide strategic and global marketing support for its worldwide Scotch whisky brands, formerly grouped under Seagram's Global Brands unit. James Espey, 48, was named London-based president of the new unit, from chairman of United Distillers North America. DDB Needham Worldwide and Ogilvy & Mather are lead agencies for Seagram's distilled spirits.

NEW CAMPAIGNS: National Dairy Promotion & Research Board on April 27 breaks a \$5.6 million cable, syndication and spot TV campaign in 68 markets positioning chocolate milk as a children's snack. State and regional dairy associations may provide additional TV, radio and in-store support. McCann-Erickson Worldwide, San Francisco, is the agency. . . . **Mayflower Transit** last week broke its most aggressive national campaign in recent years, a TV and magazine effort from Young & Laramore, Indianapolis.

ACCOUNT ACTION: Serta, Des Plaines, Ill., has begun reviewing its estimated \$5 million to \$7 million print and TV account. Incumbent Noble & Associates, Chicago, will pitch. . . . **Pfizer**, New York, to **Partners & Shevack** from Backer Spielvogel Bates for its \$10 million Visine eye-drop account. . . . **USAir**, Arlington, Va., to **Earle Palmer Brown Cos.**, Bethesda, Md., from Great Scott Advertising, New York, for its estimated \$5 million Trump Shuttle account. . . . **Rax Restaurants**, Dublin, Ohio, to **Deutsch**, New York, for its \$5 million account. Rax took the account in-house after splitting with Rosenfeld, Sirowitz, Humphrey & Strauss a year ago. . . . **Sun Line Cruises**, New York, kept **AC&R** for its \$2 million account after a review.

OBITUARIES: William L. Hendricks, 87, a former Warner Bros. executive, died of a heart attack March 29 in Burbank, Calif. Mr. Hendricks was director of Warner's commercial production division in the 1970s and co-wrote the book "Showmanship in Advertising." . . . **Graham K. Gloss**, 35, retired publisher of *South Florida Magazine* and *Florida Home & Garden*, Miami, died March 30 in Coral Gables of complications associated with AIDS.

WORTH NOTING: IBM Corp. will be the sole sponsor of a special issue of *Time*, themed "The Millennium" and focusing on the future. The issue will be mailed to subscribers in September and sold on newsstands with a fall 1992 cover date. . . . **The New York Times Co.** combined the custom publishing operations of its flagship newspaper and two magazine divisions to form NYT Custom Publishing. The new group will publish one-shot magazines, special issues, supplements, event guides and advertorials.

SEE ROSS RUN

Perot trolls for media advice on candidacy

By Steven W. Cofford

H. Ross Perot has started to explore the advertising needs that would accompany his possible run for the White House.

Ray Strother, a longtime Democratic media consultant and former New Orleans adman, said he recently met with Mr. Perot to discuss how the Texas billionaire might deliver his maverick message

if he enters the race.

Mr. Strother said he told Mr. Perot network, not regional, TV would be the "most efficient" way.

Mr. Strother said he spent two days in Dallas, Mr. Perot's headquarters, where he met with Mr. Perot and Thomas J. Luce III, a longtime friend of Mr. Perot.

"I talked with Mr. Luce about the difficulty of a third-party candidacy . . . and met with Mr. Perot and talked about the difficulty of getting his message out nationally," he said.

A Perot campaign, Mr. Strother said, "would be completely different" from any other in history.

"He doesn't have the conventional political wisdom that everyone else does," Mr. Strother said. "It would be completely dif-

ferent because Mr. Perot is so different. As a candidate, he would be bulletproof" from opponents' attacks.

"I suspect his candidacy would be very message-centered, and I suspect he would disdain the 30-second commercials and instead do the unconventional 30-minute programs and call-ins."

Mr. Perot has said he would spend \$100 million of his own on a campaign, and political strategists see much of that being allocated for media advertising.

Mr. Strother said the subject of working for Mr. Perot "didn't come up" in his conversations, but that he would "probably be interested."

"I think there's a chance he could win . . . but it would be pretty hard," he said.

John Deardourff, a partner in political media consultancy Bailey/Deardourff, Falls Church, Va., has also talked to someone in the Perot camp about the feasibility of Mr. Perot's candidacy.

A Perot campaign would have "enormous potential because of the mood in the country and the extraordinary dissatisfaction with current political figures, but the system works heavily against outsiders," Mr. Deardourff said.

He also said Mr. Perot might use longer ads.

"His message would be his reputation for getting things done," Mr. Deardourff said. "I think he'd try to deliver fundamental speeches on conditions as he sees them and what he'd do about them . . . and televise them in prime time."

Mr. Deardourff in 1990 was a campaign adviser to Mr. Luce, who sought the Republican gubernatorial nomination in Texas.

Mr. Luce said he also spoke with Linda DiVall, president of American Viewpoint, Alexandria, Va., a Republican pollster.

Ms. DiVall said only that she was contacted by a Perot emissary "about three or four weeks ago" and was asked her views on Mr. Perot's chances of winning, and about the availability of "top talent" to handle the campaign. She also said the subject of working for Mr. Perot "was broached."

"I said that I was committed to seeing George Bush getting re-elected . . . and would have a hard time" working for another candidate, she said.

Mr. Perot has said he would run for the presidency if his name could be secured on general election ballots in all 50 states. To date, he's managed to get on the ballot only in Tennessee, said Susan Davidson, a Perot Committee spokeswoman, but is expected to reach his 50-state target. □



Perot

Puris

(Continued from Page 3)

Connors, Cosmopolis, Boston. None of the three was available for comment; all, along with Mr. Puris, were involved in the 1988 Bush campaign to some degree.

"They were good people in 1988 and did good ads . . . and have experience at this," Mr. Puris said. "I'm still close with Ted and Helayne; I know they had fun in '88 and expect they'll be candidates."

Robert Gardner, president of Gardner Communications, San Francisco, is also expected to join the team. But last week, a big name in advertising took himself out of consideration.

Sean Fitzpatrick, vice chairman of McCann-Erickson Worldwide, said he will devote full attention to client General Motors Corp.'s ad needs, citing GM executive changes. Mr. Fitzpatrick had been on the Bush campaign's short list of agency people wanted for the general election.

Mr. Puris and Charlie Black, a

senior Bush/Quayle adviser, envision an ad team consisting of up to four groups in different parts of the country, feeding ideas, strategy and ads to the campaign's advertising headquarters in Washington.

Mr. Puris called himself a "fan" of Mr. Ailes, who in November announced he wouldn't play an official role in the Bush/Quayle re-election effort.

"My impression is that he'll be available from time to time for the campaign," Mr. Puris said. "George Bush loves him, and I'm sure he'll be needed."

The negative ads that drew criticism of Mr. Ailes and the 1988 campaign were "blown out of proportion," Mr. Puris said. "The Democrats set the tone. And while [negative] political advertising can mislead and distort, if done properly, it is valid and can inform the public."

Although the specifics of Mr. Puris' role are still evolving, he said the time demands could be resolved with his duties at his New York agency.

"If I could do both, then at the

crucial time give more time to the campaign for a few months while still doing work for my agency, I could see it," he said.

The campaign's tone is likely to be somewhere between the nasty level of 1988 and the "Morning in America" theme of President Reagan's 1984 re-election drive, Mr. Puris said.

"It will definitely be different from 1988," he said. "When you're working for someone who is just a candidate, it's like working for a product that's No. 2 or 3 in a category, and the advertising can be feisty. But if you're working for the president, then your client has to be and act as a president as well. It's a delicate line."

Mr. Puris called himself a political independent but was unabashedly proud of the chance to work on a presidential campaign.

"This is an exciting process," he said. "It's like what [BBDO Worldwide Vice Chairman] Phil Dusenberry said, there's just something about walking down the halls of the White House to present your stuff [to the president] that's pretty heady." □

Trade

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and to reassert the importance of media advertising (AA, April 6).

The good news for Mr. James and ad agencies is that 43% of the respondents to the Donnelley survey projected lower trade spending in 1992, with corresponding increases in consumer promotion and media advertising. In 1991, 35% had expected a decrease.

But some observers say it may be impossible for ad agencies to

reverse the flow of marketing dollars to the trade.

"This is more than a major challenge for ad agencies; this may be a sea change," said Don Schultz, a professor in the integrated communications department of Northwestern University's Medill School of Journalism.

"These numbers reflect how strongly the power in the marketplace has shifted to the retailer," he said. "This is more a strategic than a recessionary shift in thinking and spending."

Last year's numbers also reflect

the development of strategic alliances between manufacturers and retailers, a factor that's worked against media advertising, Mr. Schultz said.

"If I've got a deal with Wal-Mart to give them what they want to display my product, do I need to spend a lot on [media] advertising? Is display enough to keep the brand going? The jury's still out. But manufacturers are running scared right now," he said.

Among other highlights of the survey:

■ Database marketing is growing. Two-thirds of respondents said

they're compiling and using consumer databases, compared with 48% in 1990. Among those building databases, mail-in premium offers and sweepstakes are the most commonly used method of information collection, followed by trackable coupons and rebates.

More than two-thirds of those using database marketing enhance their data with outside demographic and lifestyle information.

■ Trade promotion programs are also more targeted, with 87% of respondents saying they've implemented account-specific promo-

tions for key retail customers. Most (80%) of those surveyed say they plan to increase budget allocations to these programs in 1992.

■ Ethnic-specific marketing programs are popular, with 57% conducting promotions targeted to Hispanics and 30% with promotions targeted to blacks. Overall, ethnic marketing programs account for 7% of consumer promotion budgets.

The research was conducted in October 1991, with 47 major consumer products marketers completing and returning survey forms. □